



Utah Overnight Leisure | 2005 VISITOR PROFILE



Research Report Table of Contents



Executive Summary	5	Household Income	101
Key Conclusion & Recommendations	9	Household Lifestage	103
Market Assessment		Generation	108
U.S.		Occupation	113
Data Weight Definitions	15	Targeting Summary Intelligence	115
Stays Volume	18	Positioning	
Person-Stays Volume	23	Introduction	118
Person-Days Volume	28	Stay Purpose	120
Traveler Spending	33	Stays Composition and Size	124
Utah		Stay Length	129
Stays Volume	46	Average Daily Per Person Spending	134
Person-Stays Volume	55	Activities	137
Person-Days Volume	64	Transportation	147
Traveler Spending	73	Trip Timing	149
Market Share of U.S.	84	Accommodations	154
Satisfaction and Value Ratings	86	Positioning Summary Intelligence	158
Targeting		Communicating	
Introduction	93	Introduction	161
Age	95	Visitor Origin Markets	163
Children in Household	99	Travel Distance	169
		Communicating Summary Intelligence	173



Appendices

Appendix A:	Company Overview	176
Appendix B:	Methodology	180
Appendix C:	Study Specifications and Definitions	182
Appendix D:	Questionnaire	187
Appendix E:	Economy In Review: 2005	207
Appendix F:	2005 Travel Industry Overview	211



- The report you are about to read is a comprehensive analysis of the travel market in the U.S. and Utah. After reviewing this report, it is DKS&A's intention for travel marketers and planners to be better armed with the intelligence they need to develop tourism marketing strategies that will attract new visitors and provide a travel experience that will earn repeat visits and referrals.
- The body of this report is divided into four main sections, which are further targeted to various roles within the tourism organization.
 - The *Market Assessment* section of this report will give the reader an understanding of the size of the tourism market in the U.S. as well as the destination itself.
 - The *Targeting* section describes travelers to a destination and helps travel marketers and planners target future visitors by identifying the largest market segment as well as the growth segments.
 - In the *Positioning* section, the reader will gain an in-depth understanding of the destination's positioning against the competition, which will help to better craft product offerings and messages to the target markets.
 - Finally, the *Communicating* section will help the reader know from where the destination's visitors are originating so that they can launch marketing campaigns that are developed from the intelligence provided in the Targeting and Positioning sections.
- Each of these sections is further divided into three sub-sections:
 - *Section Introduction*: The introduction will introduce the reader to the analysis that will be presented in the upcoming section so the reader will have a better understanding of the fine details.
 - *Detailed Data Graphs*: The detailed data graphs present the data in three primary ways
 - the destination compared to the U.S. and Competitive Set,
 - the destination compared to five specific competitors, and
 - the destination's performance between 2005 and 2004.
 - *Section Summary Findings*: The section summary findings reviews the key conclusions from the data presented in the detailed graphs. This section is good for busy executives who need to know the key conclusions from the data.



Background

This Utah visitor study provides travel intelligence on U.S. and Utah travel trends from 2005. Information is also provided for the competitive set of five destinations (Colorado, Arizona, New Mexico, and the Northern Rockies region). Volume and profile data are from D. K. Shifflet & Associate's *PERFORMANCE/Monitor*SM travel intelligence system – the largest travel-tracking system in the U.S. The 2005 Utah visitor profile is based on a sample of 475 overnight leisure Stays. Appendix B contains details on study methodology, while Appendix C contains definitions of terms such as *Person-Stays* and *Person-Days*.

Market Assessment

U.S. Volume Trends: The U.S. travel industry reached record levels for total and all leisure segments in 2005 for each of the four key travel measures: Stays, Travelers, Person-Days, and direct spending. Previous high records for the Business segment, which were set in 2000, were exceeded for all Business segments in 2005, except for Stays. Stays increased 2.8% to 1.38 billion in 2005, Total Travelers increased 4.1% to 3.02 billion, Total Person-Days increased 2.6% to 6.60 billion, and Traveler Spending increased 3.1% to \$700.2 billion. All Leisure segments (Total, Overnight, Day) experienced growth in 2005 to record levels. Overnight Leisure grew 3.0% to a record 1.14 billion travelers. Growth in Overnight Leisure Spending was even greater (3.8%) to a record \$409 billion. Overnight Leisure's growth rate in Travelers is slightly higher than the growth rate in Stays (+2.8%) due to a small increase in Average Party Size. Conversely, growth in Overnight Leisure person-days (2.4%) is smaller than the Traveler growth rate due to a decline in Average Length of Stay, caused by an increase in the number of day trips.



Utah Volume Trends: Utah travel volume continued to increase in 2005 driven by several factors. Total travel party volume to the State grew 0.2% to 10.14 million travel parties, led by a 2.5% increase in leisure travel party volume. Leisure travel party volume hit 7.33 million travel parties in 2005, muting the 5.5% decline in business travel party volume. In terms of individual travelers, person-stays volume grew in all segments: total travel up 2.6% to 31.21 million, leisure travel up 2.7% to 24.87 million, and business travel up 2.3% to 6.34 million. Finally, person-days volume, a combination of travel volume, length of stay, and party size, increased in Utah to 69.27 million travelers, a 0.4% increase over 2004. This was mainly led by the business market which grew 1.7% to 16.33 million visitor-days rather than the leisure segment which remained unchanged over 2004. This translated into increased total traveler spending in 2005 to \$6.35 billion due to a 4.5% increase in business travel spending and 7.0% increase in leisure travel spending, reaching \$2.22 billion and \$4.13 billion, respectively.

Overnight leisure travel, the focus of this report, decreased in all measures, except the Direct Spending: down 3.7% to 3.32 million travel parties, down 1.8% to 11.73 million person-stays, and down 1.4% to 43.09 million person-days. The overnight leisure travel segment accounted for 53% of total travel spending and reached \$3.36 billion in 2005.

Utah Market Share: In the overnight leisure travel market, 2005 marks another year where Utah continues to lose ground in U.S. volume. As a result, the State slightly decreased its share of the U.S. overnight leisure market (0.98%) at an accelerating pace, down 0.7% in 2004 and at an even greater rate, down 1.0% in 2005. Thereby, Utah gave up the rank in the top U.S. destination States to Oklahoma (1.23%), Mississippi (1.03%), Kansas (1.02%), and Maryland (1.02%).



Targeting

The majority of overnight leisure travelers in Utah can be described by the key lifestage, the 18-34, Family segment which represents 25% of the State's market. While this segment describes the primary market in Utah, the 55+, Hi Free lifestage is also a favorable target, because of the volume it represents, as well as its spending potential. The 55+, Hi Free segment represents 21% of all overnight leisure spending in Utah, compared to 20% by the 18-34, Family segment.

Positioning

The primary purpose for visiting Utah among overnight leisure visitors is to visit friends or relatives, representing 34% of the market. The VFR traveler not only represents the largest segment in terms of volume, it also has the greatest spending potential. When looking solely at the discretionary leisure market, the primary reason overnight leisure travelers visit Utah is for a general vacation, 22%. The State faces a competitive threat from the competitive set which attracts a higher share of general vacation traveler than Utah.

The average party size of overnight leisure travel parties in Utah during the 2005 timeframe was 2.98 persons, which decreased slightly from 3.04 persons in 2004. The typical party type seen in Utah are couples (38%) and families (36%) which represent the highest shares of volume in the overnight leisure market. In terms of favorable targets, large travel parties comprised of three or more adults spent the most on average (\$1,668), leading spending by families (\$800) by a wide margin.



Positioning (con't)

The average length of stay by overnight leisure visitors to Utah increased from 2.84 to 3.16 nights between the 2004 and 2005 timeframes. Compared to the national average, 2.91 nights, overnight leisure visitors to Utah stay for slightly longer periods of time. In terms of daily spending per person, costs for overnight leisure visitors to travel to Utah are similar to any U.S. average destination but lower for all other spending categories. Overnight leisure visitors to Utah can expect to spend \$83 per person per day compared to \$102 per person per day in the U.S.

Utah consistently offers enjoyable leisure activities to its visitors. Key activities that overnight leisure visitors participated in during the 2005 timeframe were sightseeing, expenditure-based activities, such as shopping, dining, entertainment, and nature-based activities like national/state parks, hike/bike, and camping.

The summer season is a key travel season for Utah, its comp set, and the U.S. accounting for the majority of overnight leisure travel throughout the year. However, as in years past, Utah does not differentiate itself in terms of attracting visitors during any season.

Communicating

Origin markets of overnight leisure visitors to Utah come from many nearby markets in the Western region of the U.S. In terms of key origin states, Utah, California, Idaho, and Nevada account for almost two-thirds (65%) of overnight leisure travel in the State. Key origin DMAs include Salt Lake City, UT, Los Angeles, CA, Las Vegas, NV, Idaho Falls-Pocatello, ID, and Sacramento-Stockton-Modesto, CA contributing 65% of overnight leisure travel to Utah's market, with in-State visitors alone generating 40%.

Key Conclusion and Recommendations



Year 2005 was a weaker year for Utah overnight leisure travel compared to past years. The State is settling into a recovery from the challenges the U.S. travel market has faced over the last few years - conflict, terrorism, and economic instability. While Utah struggled in 2005 to meet some of the records set in previous years in the overnight leisure market, the State consistently attracts its key markets and offers leisure activities that provide the overnight leisure traveler value in challenging times. The following recommendations will help travel marketers in Utah return to the path of growth:

Focus on your customer - Key segments describe the mass market in Utah overnight leisure travel and are customers that deserve attention. Segments such as the 18-34, Family lifestage, general vacation travelers, or families are all segments that dominate overnight leisure travel in Utah.

Focus on the opportunity - While understanding the overnight leisure travel market in terms of who is visiting the state, why, and what they do is imperative in painting a picture of travel to Utah, it is also important to focus on the opportunities that lie ahead for Utah travel. Many segments have the potential to offer not only increased traveler volume but increased traveler spending. Segments such as the 55+, Hi Free, general vacationers, and three or more adults hold the potential to increase Utah's bottom line in traveler spending.



Market Assessment

How many visitors does Utah attract?
What is Utah's share of U.S. and regional travel?



Targeting

Who are Utah's most important visitors?



Positioning

How should Utah position its product?



Communicating

Where should Utah advertise and promote?



What is the size and scope of tourism nationally, regionally and locally?
How is Utah doing compared to the competitors in capturing market share?
What are the trends?

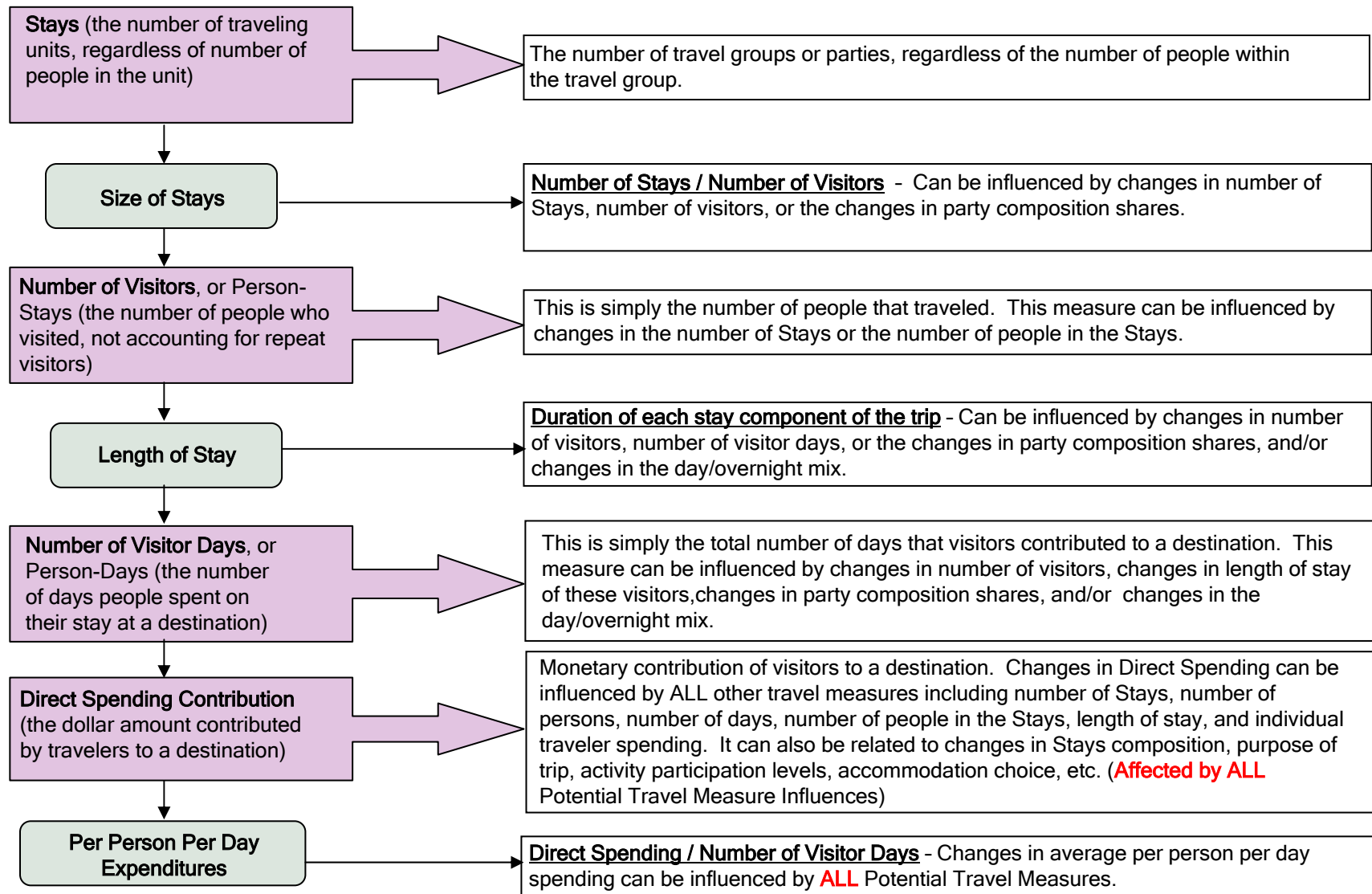




- The Market Assessment section of this report will provide an overview of the U.S. travel market by reviewing population and travel volume trends. Travel volume is measured with four performance indicators (described in detail on the next page) to help destinations understand past market movements and prepare for possible changes in the future.
- The Market Assessment section goes into further detail of the market trends in Utah. This information will help Utah understand the size of the U.S. travel market and the opportunities to increase the size of their market, whether it be in terms of visitor volume, visitor days, Stays or total direct spending.
- Travel volume is estimated from D.K. Shifflet & Associates' *PERFORMANCE/Monitor*™ monthly travel tracking system and uses other available travel data as model inputs, such as hotel data and government transportation statistics.
- The section ends with a review of traveler satisfaction and value ratings of Utah. The ratings are compared to the competition using the U.S. as a benchmark and will give destination's competitive intelligence on consumer perceptions of travel satisfaction and value.

U.S. Detailed Volume Findings





Data Weight Definitions and Examples



Unweighted: the raw data that contains no links to the population or DKS&A modeling; it is simply respondent data as returned to us on the surveys.

Respondent Weight: links to the population and not to any modeling of the data. This weight re-balances the data by the demographic characteristics of age, gender, income, education, number of adults, and state of residence.

Stays Weight: the most basic travel weight. It is the broadest unit used for measuring a travel experience. To arrive at the Stays weight, the respondent weight is adjusted based on variables in order to ensure that there are a certain number of trips that fit standards. These adjustments are based on length of stay, length of trip, mode of transportation, purpose of trip, and special adjustments for particular mailing months and destinations.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 1 Stays.

Person-Stays Weight: The total number of people on a stay, regardless of the length of their stay. This measure equates to the number of visitors.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 2 Person-Stays or 2 visitors.

Person-Days Weight: The total number of people on a stay multiplied by the number of days they are on the stay.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 10 person-days. (2 Person-Stays x 5 days)

Room Nights Weight: The number of nights spent in a room, regardless of the number of people staying in the room.

*Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 5 Room Nights.
(given they stayed in a paid accommodation (most applicable))*

Trip-Dollars Weight: Use of this weight takes into account the amount of money spent by travelers. In other words, it accounts for the dollars contributed to a destination's economy by travelers. Using the trip-dollars weight shows the monetary worth/contribution of travelers as opposed to the contribution of number of trips or number of days spent in the destination.

If Mr. & Mrs. Smith spent \$100 per person per day on their 5 day vacation in Anytown, USA, their trip expenditures would be \$1,000 (10 person-days x \$100 per person per day).

U.S. Volume Changes Explained



		2004	2005	% Change
Stays (millions)				
	Total	1,346.2	1,383.9	2.8%
	Business	463.3	475.0	2.5%
	Leisure	882.9	908.9	2.9%
Average Party Size (persons)				
	Total	2.16	2.18	1.3%
	Business	1.57	1.63	4.2%
	Leisure	2.47	2.47	0.3%
Visitors (Person-Stays) (millions)				
	Total	2,903.0	3,022.8	4.1%
	Business	725.6	774.9	6.8%
	Leisure	2,177.4	2,247.9	3.2%
Average Stay Length (travel parties/0+ days)				
	Total	2.22	2.18	-1.5%
	Business	2.07	1.99	-3.9%
	Leisure	2.26	2.25	-0.6%
Visitor Days (Persons Days) (millions)				
	Total	6,430.6	6,596.4	2.6%
	Business	1,499.7	1,538.7	2.6%
	Leisure	4,930.9	5,057.7	2.6%
Day/ Overnight Mix (% Day Trips)				
	Total	51%	51%	1.0%
	Business	54%	56%	2.6%
	Leisure	49%	49%	0.2%
Average Party Spending (\$)				
	Total	\$504.4	\$506.0	0.3%
	Business	\$428.0	\$429.4	0.3%
	Leisure	\$544.5	\$545.9	0.3%
Total Direct Spending (\$ billions)				
	Total	\$679.0	\$700.2	3.1%
	Business	\$198.3	\$204.0	2.9%
	Leisure	\$480.7	\$496.2	3.2%
Spending per Person per Day (\$)				
	Total	\$105.6	\$106.1	0.5%
	Business	\$132.2	\$132.6	0.3%
	Leisure	\$97.5	\$98.1	0.6%

Total U.S. Stays volume increased 2.8% from 2004 to 2005. This increase was led by the Leisure segment, which grew 2.9% and makes up the highest share of Stays. The Business segment also continued a two-year growth trend, increasing 2.5% in 2005.

The growth in Stays volume, coupled with an increase in Average Party Size produced an even larger growth in Travelers in 2005 of 4.1%.

Conversely, a decrease in stay length measured in days, due in part to a small increase in the proportion of Day trips, produced a smaller increase in Visitor Days of 2.6%.

Even though total Spending per Person per Day is flat, the 1.3% total average Party Size increase neutralizes the 1.5% total average Stay Length decrease, resulting in a flat total average Party Spending performance (up 0.3%). Thus, coupled with the 4.1% increase in Person-Stays, contributes to a moderate 3.1% increase in Total Direct Spending.

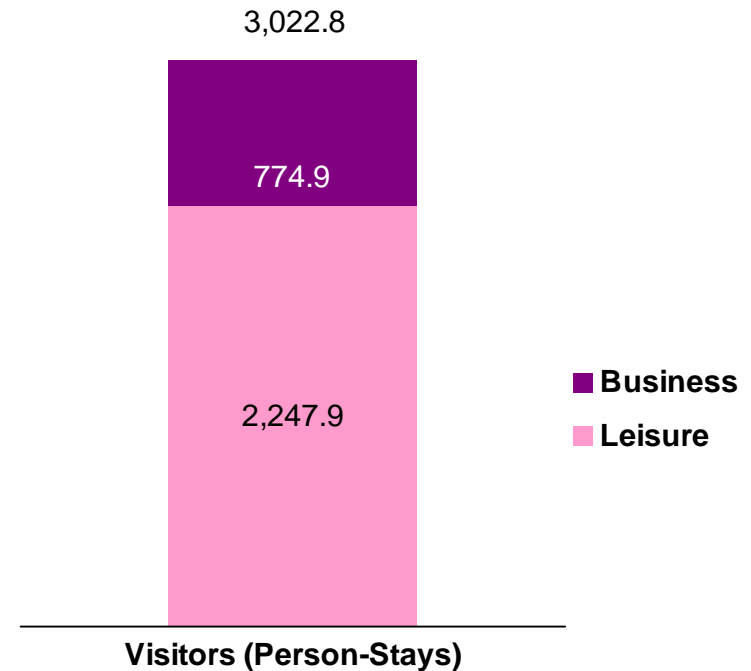
Please refer to the adjacent chart for changes in Total Business and Leisure travel segments.

2005 U.S. Travel Volume Summary Introduction



U.S. residents produced a record 3.02 billion travelers in 2005, the eighth consecutive record year. The total increase of 4.1% was led by both the day segment (5.8%) and the overnight segment (2.4%). Across business and leisure, it was day business (up 11.9%) and night leisure (up 3.0%) that drove the increases.

■ Total Night
 ■ Night Business
 ■ Night Leisure



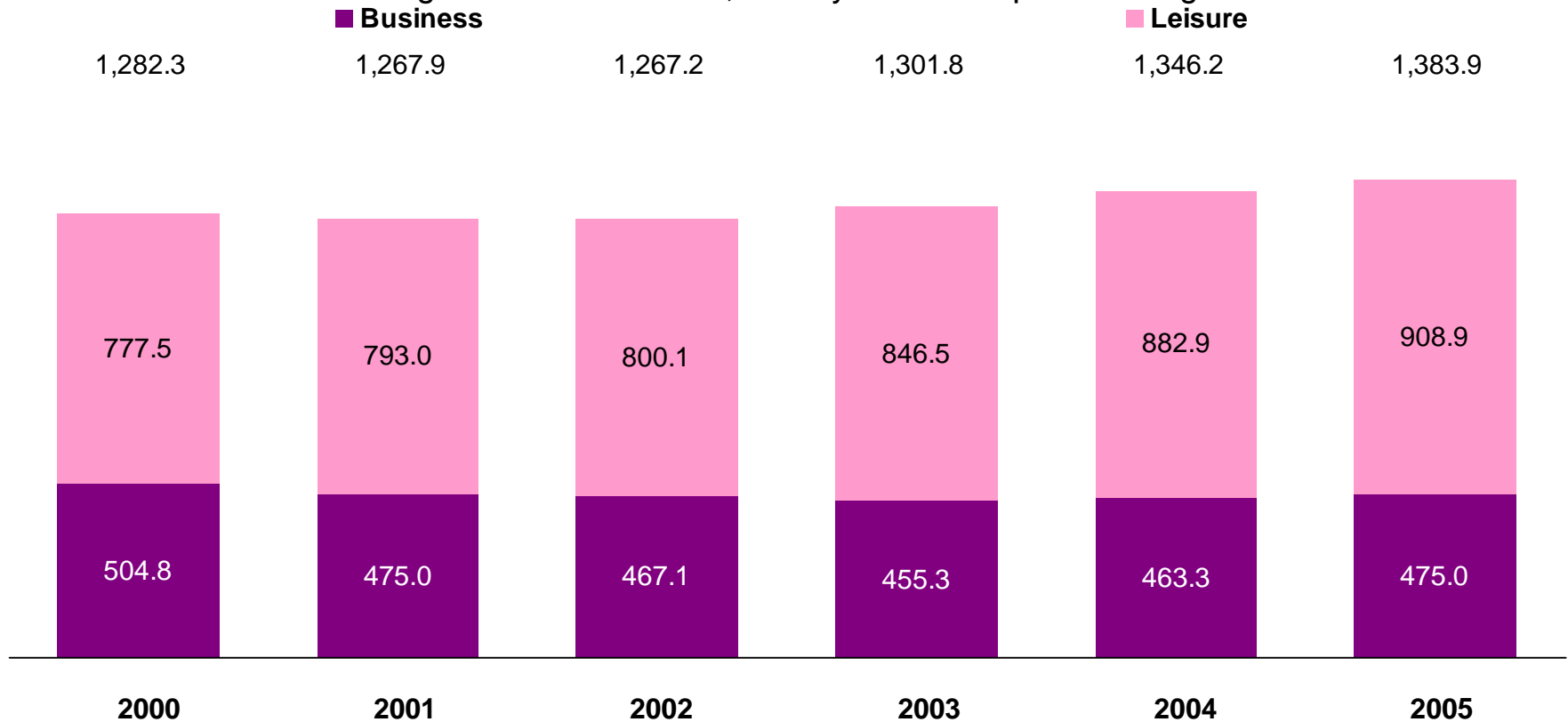
Growth of overnight leisure stay (3.0%) was more substantial than overnight business Stays (0.6%). Among hotels room-nights, growth of overnight leisure was even greater at 6.8%. This indicates that hotel nights made up a larger piece of the overall overnight leisure increase. This growth also helped offset a decline in hotel overnight business (down 1.0%).

The following section will describe the U.S. volume trend in detail.

U.S. Stays Volume: Business vs. Leisure (2000-2005/Millions)



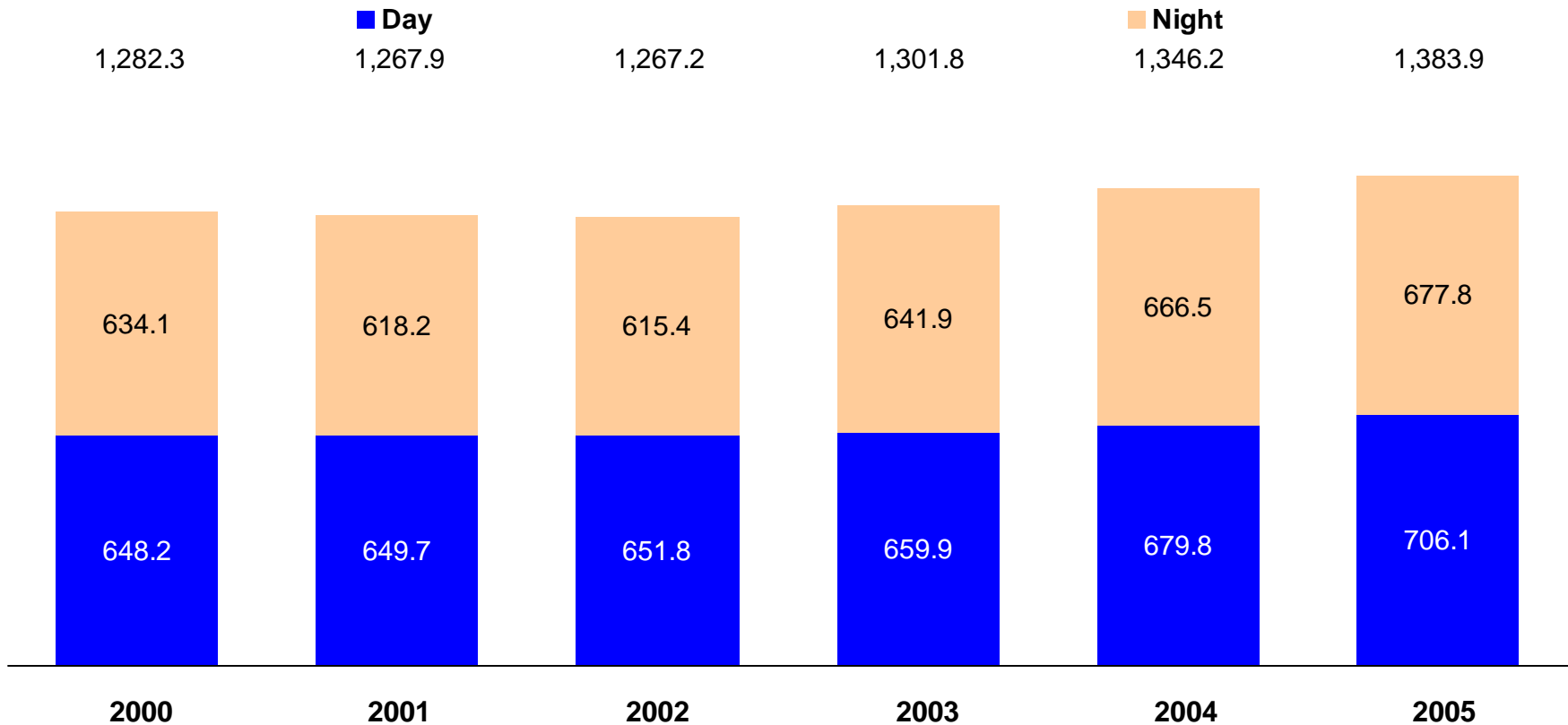
U.S. residents visiting U.S. destinations generated a record 1.38 billion Stays in 2005, a 2.8% increase over 2004. Both Leisure and Business Stays drove the industry growth, increasing 2.9% and 2.5%, respectively. Although the Leisure segment grew more since 2000, its share of Stays increasing from 60% in 2000 to 66% in 2005, it has not been growing as robustly as it did in 2003 and 2004. The Business segment recovered moderately since 2003 (when it decreased 2.5%) and now matches the high it reached in 2001, but is yet to reach pre-2000 highs.



U.S. Stays Volume: Day vs. Overnight (2000-2005/Millions)



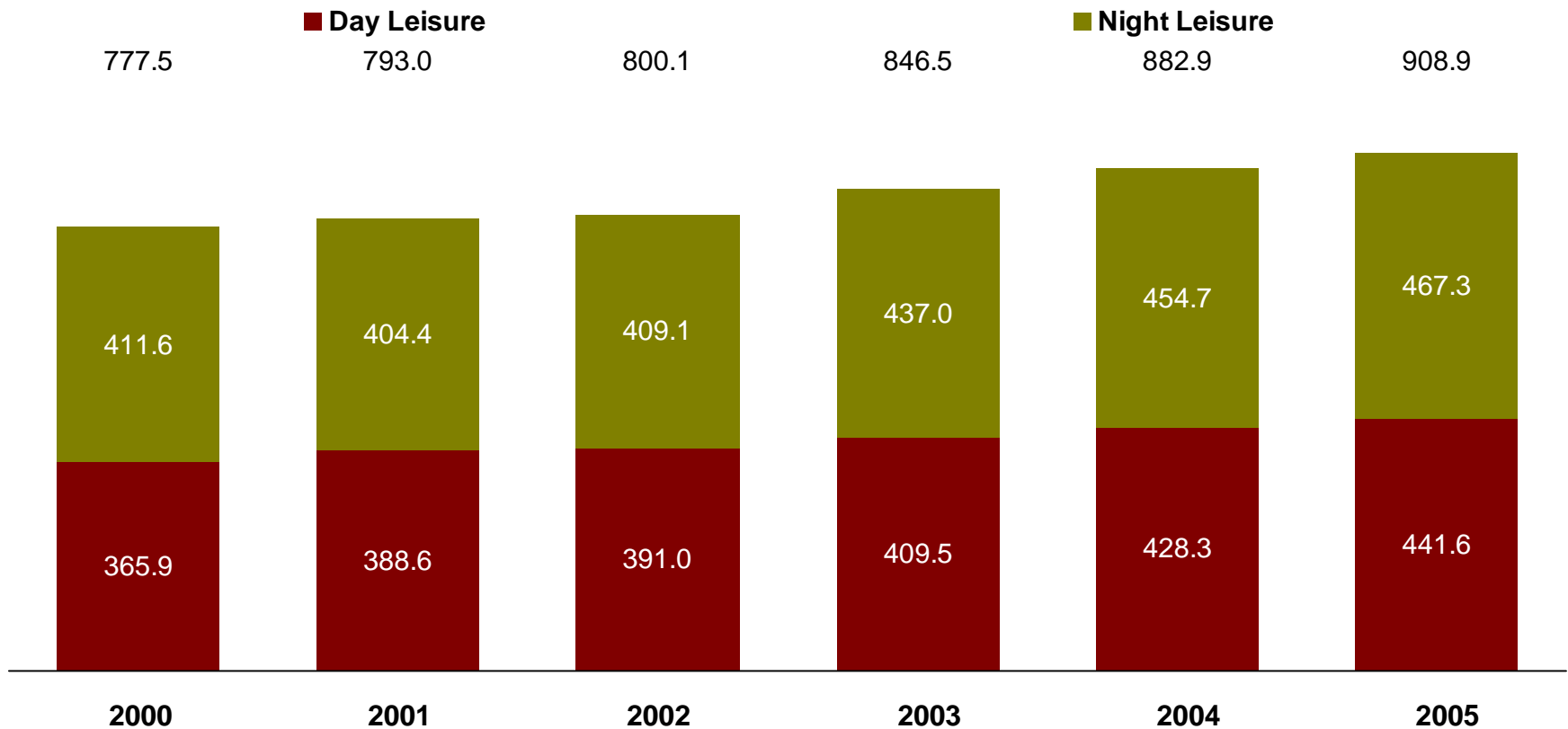
U.S. residents produced record numbers of both Day and Overnight Stays. Stays on day trips grew 3.9% to 706.1 million in 2005 and those on Overnight Stays grew 1.7% to 677.8 million. Since 2000, Day Stays experienced a greater increase (8.9%) than Overnight Stays (6.9%). Day Stays have grown steadily since 2000 and had one of the largest increases in 2005. Night Stays grew from 2003 to 2005, but at a decreasing rate.



U.S. Stays Volume: Day Leisure vs. Overnight Leisure (2000-2005/Millions)



U.S. residents reached new records in the number of both Day Leisure and Overnight Leisure Stays taken. Day Leisure Stays grew 3.1% to 442 million in 2005 and those on Overnight Leisure Stays grew 2.8% to 467 million. Since 2000, growth in the Day Leisure segment outpaced that of the overnight leisure segment (21% vs. 14%). The Day Leisure segment also made up a larger share of Leisure Stays in 2005 (49%), than in 2001 (47%).



U.S. Stays Volume: % Change by Travel Segment (2000-2005)



This table shows the year-to-year percent changes in Stays volume for each of the primary travel segments.

	01/00	02/01	03/02	04/03	05/04
Total	-1.1%	-0.1%	2.7%	3.4%	2.8%
Business	-5.9%	-1.6%	-2.5%	1.7%	2.5%
Leisure	2.0%	0.9%	5.8%	4.3%	2.9%
Day	0.2%	0.3%	1.2%	3.0%	3.9%
Night	-2.5%	-0.5%	4.3%	3.8%	1.7%
Day Business	-7.5%	-0.1%	-4.0%	0.4%	5.2%
Day Leisure	6.2%	0.6%	4.7%	4.6%	3.1%
Night Business	-3.9%	-3.5%	-0.7%	3.4%	-0.6%
Night Leisure	-1.8%	1.2%	6.8%	4.0%	2.8%

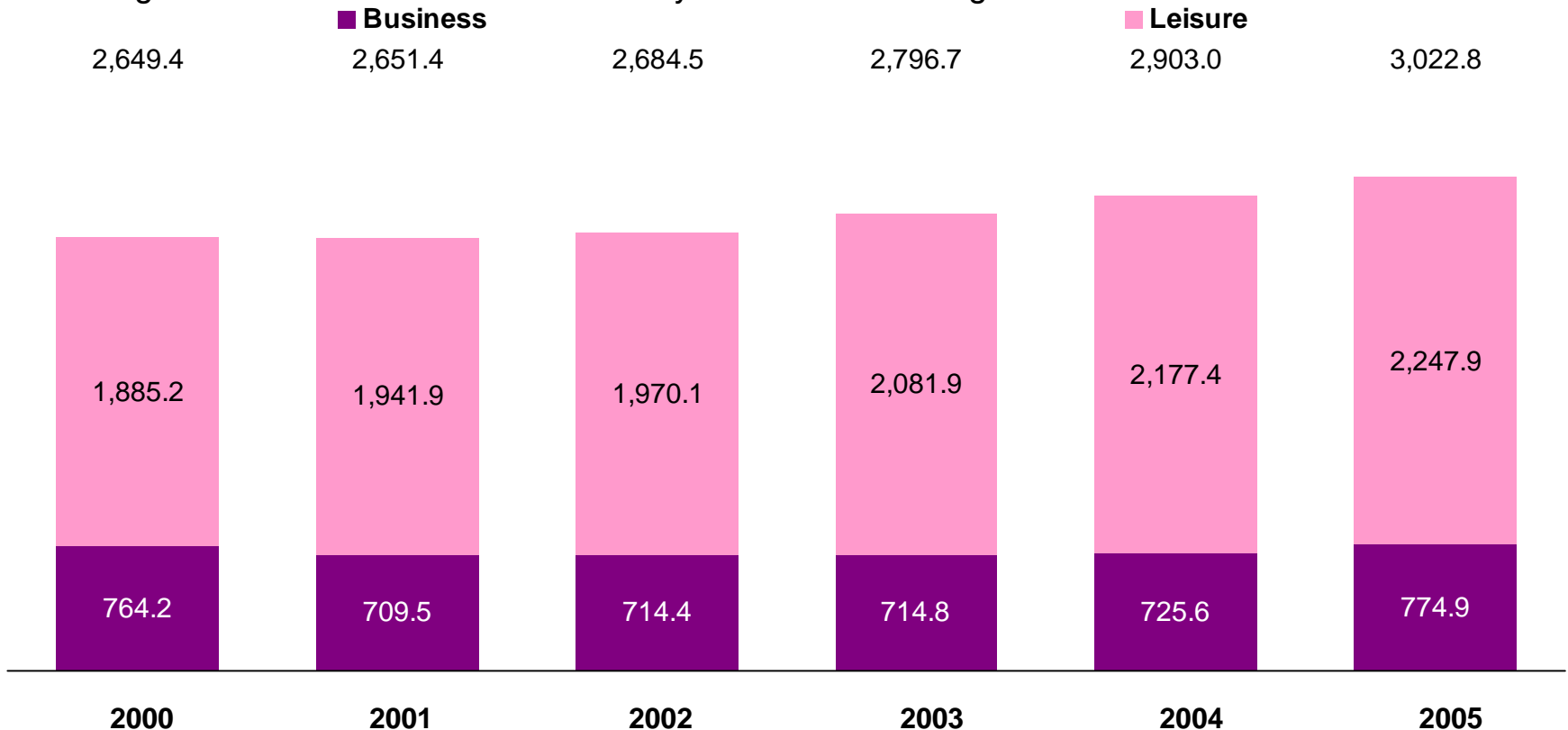


- U.S. Stays volume grew 2.8% in 2005, continuing the positive trend that begun three years ago.
- The Travel Story in 2005 is about the continued growth in the Leisure travel party segment. Leisure demand makes up 66% of all 2005 Stays. All Leisure segments were up 2.8%-3.1% in 2005. This growth continues the long-term trend of the increasing importance of the Leisure segment.
- Day travel was also a driver behind 2005's growth in U.S. Stays volume, experiencing the largest increase (3.9%) among all segments. Day travel's importance in U.S. Stays volume is increasing as its share has now reached 51% of total Stays. The Day and Leisure segments are the only segments to have experienced increases within the past five years.
- Day Business travel has been on the rebound in the past two years and had the greatest increase in 2005 (5.2%). Due to Day Business' small share in U.S. Stays volume, growth in this segment does not make a big impact on total volume. Overnight Business demand slipped slightly in 2005 but overnight leisure demand remained strong, reaching an all-time high of 467.3 million Stays.

U.S. Person-Stays Volume: Business vs. Leisure (2000-2005/Millions)



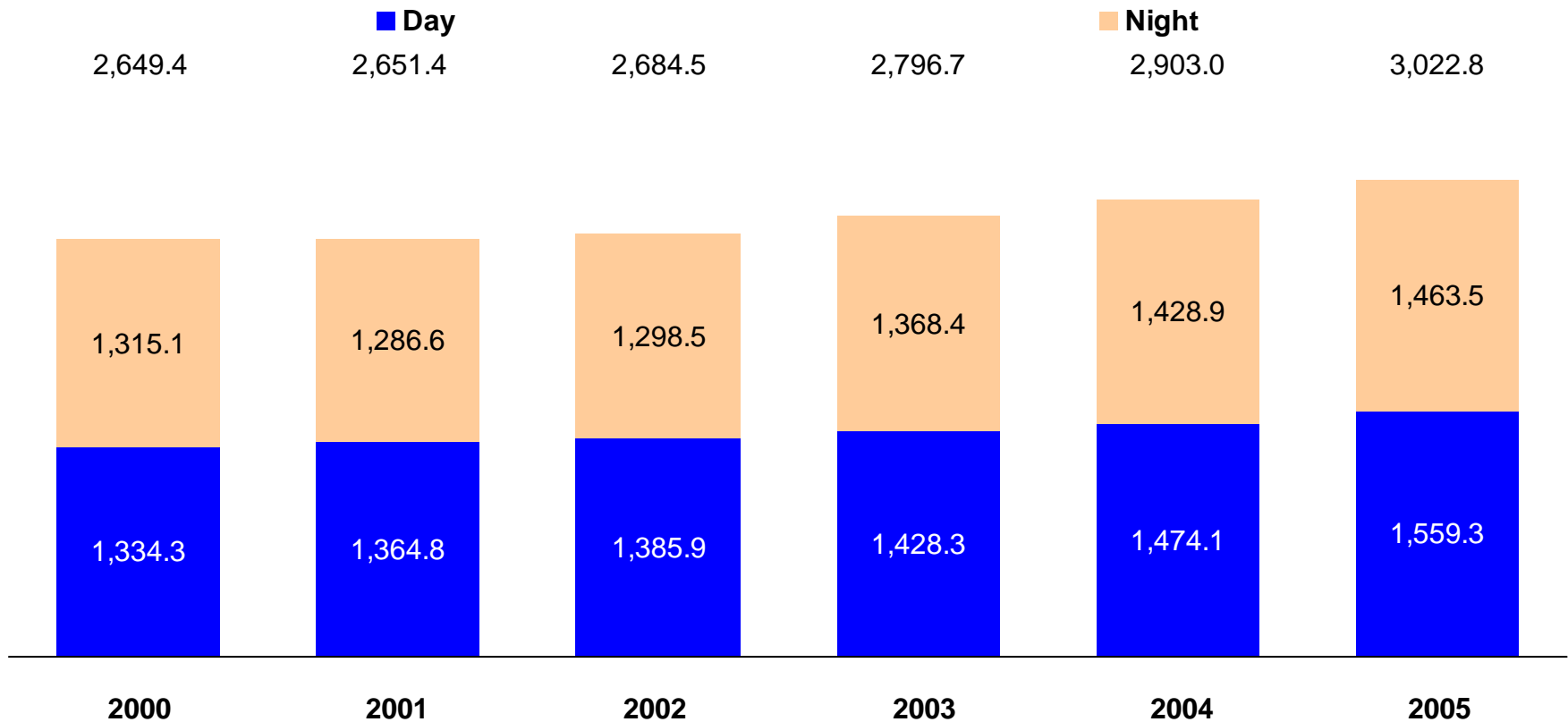
U.S. residents traveling in the U.S. produced a record 3.02 billion travelers in 2005 (4.1%). Both Leisure and Business segments drove the travel volume to experience this growth. Although the Business segment makes up a much smaller share of the total (26%), it increased at the highest rate in 13 years and finally surpassed the high it reached in 2000, showing some recovery after September 11, 2001. Leisure Person-Stays volume also reached an all-time high, signaling strength with its share of U.S. Person-Stays volume increasing from 71% in 2000 to 74% in 2005.



U.S. Person-Stays Volume: Day vs. Overnight (2000-2005/Millions)



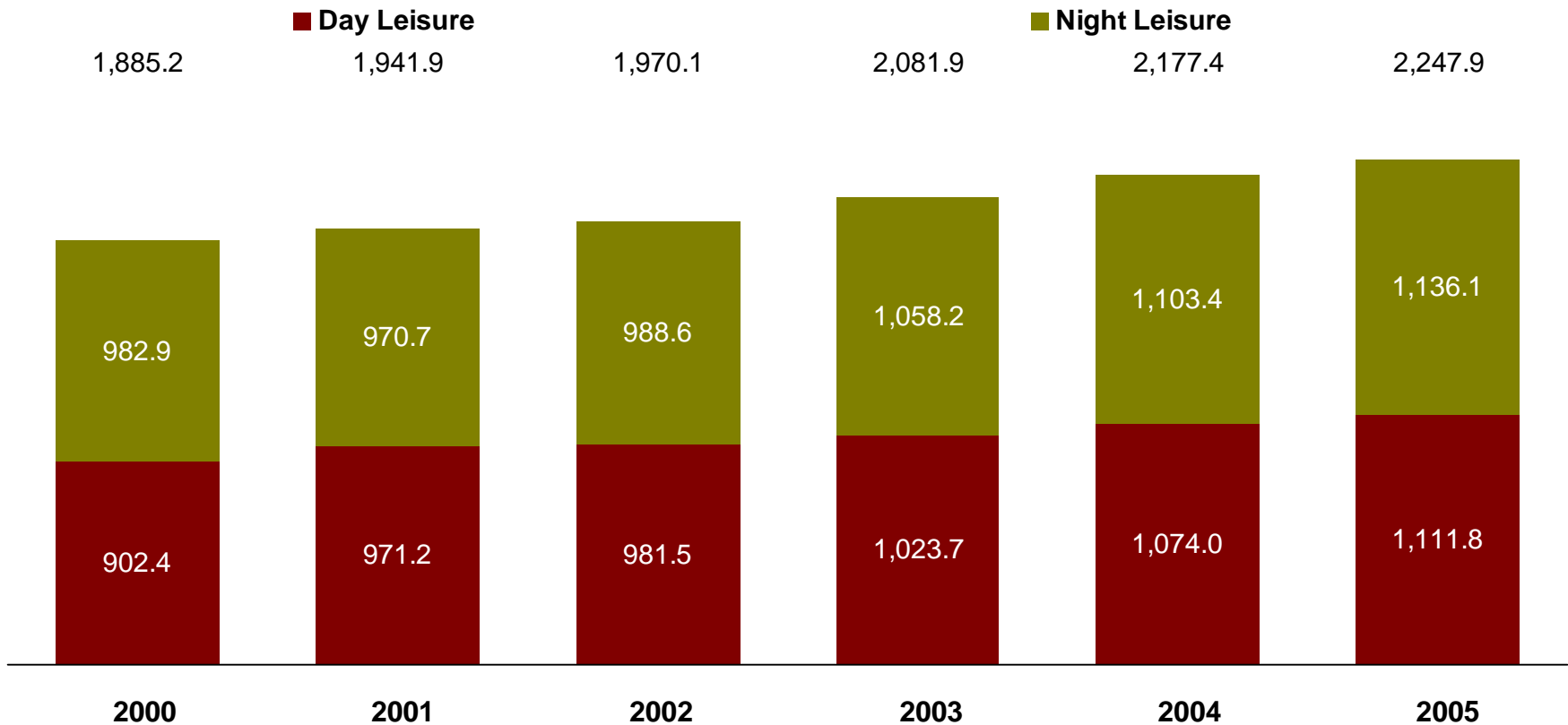
U.S. residents created record numbers of both Day and Overnight Travelers in 2005. Day trip demand grew 5.8% to 1.56 billion in 2005 and demand for Overnight trips grew 2.4% to 1.46 billion. Both segments grew since 2000 at high rates (Day: 17%; Overnight: 11%). Since 2000, Day Person-Stays share has increased from 50% to 52% in 2005, as a result of the greater increases in U.S. day trip travel.



U.S. Person-Stays Volume: Day Leisure vs. Overnight Leisure (2000-2005/Millions)



U.S. residents produced new records in the number of both Day Leisure and Overnight Leisure travelers in 2005. Leisure day trip demand grew 3.5% to 1.11 billion in 2005. Overnight Leisure demand grew 3.0% to 1.14 billion. Over the past five years, growth in the Day Leisure segment outpaced that of the Overnight Leisure segment (23% vs. 10%) but Overnight Leisure is still the largest segment in U.S. Person-Stays volume, contributing greatly to the growth in 2005.



U.S. Person-Stays Volume: % Change by Travel Segment (2000-2005)



This table shows the year-to-year percent changes in Person-Stays volume for each of the primary travel segments.

	01/00	02/01	03/02	04/03	05/04
Total	0.1%	1.2%	4.2%	3.8%	4.1%
Business	-7.2%	0.7%	0.1%	1.5%	6.8%
Leisure	3.0%	1.5%	5.7%	4.6%	3.2%
Day	2.3%	1.5%	3.1%	3.2%	5.8%
Night	-2.2%	0.9%	5.4%	4.4%	2.4%
Day Business	-8.9%	2.8%	0.0%	-1.1%	11.9%
Day Leisure	7.6%	1.1%	4.3%	4.9%	3.5%
Night Business	-4.9%	-1.9%	0.1%	4.9%	0.6%
Night Leisure	-1.2%	1.8%	7.0%	4.3%	3.0%

U.S. Person-Stays Volume Intelligence

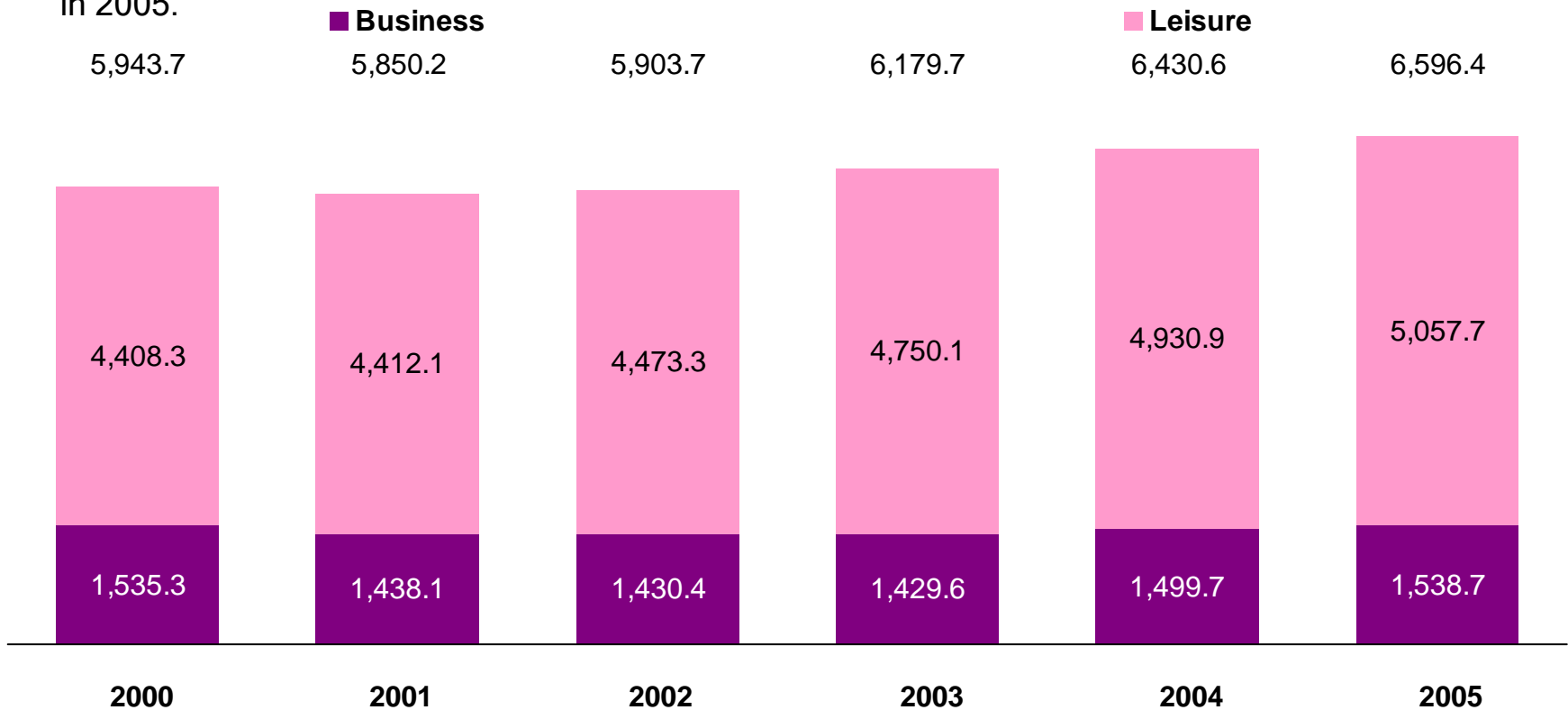


- Total Person-Stay volume reached a record level for the eighth consecutive year. In fact, only the consecutive declines from 1995-1997 have interrupted the growth in Person-Stay volume since 1992.
- Trends for Person-Stays volume are very similar to those for Stays. By definition, Person-Stay volume trends differ from Stays volume trends by changes in Average Party Size.
- Total party size increased 1.3% in 2005 mainly because of the Business segment's 4.2% increase in party size. Leisure party size increased 0.3% in 2005. This increase explains the larger numbers in Person-Stays volume compared to Stays volume.
- Total Traveler volume increased 4.1% in 2005, slightly higher than the comparable increase in Stays, due to the increase in Average Party Size. This trend held true for all Leisure segments--total Leisure, overnight leisure, Day Leisure--and for the Overnight Business segment. In fact, the small increase in Average Party Size served as a catalyst for Day Business Person-Stays to produce a 11.9% segment growth in 2005, followed by a 6.8% increase in Total Business Person-Stays and a 5.8% growth in Total Day Person-Stays.
- The big headliners in terms of growth over 2004 were Business and Days Person-Stays, even if their shares may be smaller, their growth rate surpassed those of their Leisure and Overnight counterparts.

U.S. Person-Days Volume: Business vs. Leisure (2000-2005/Millions)



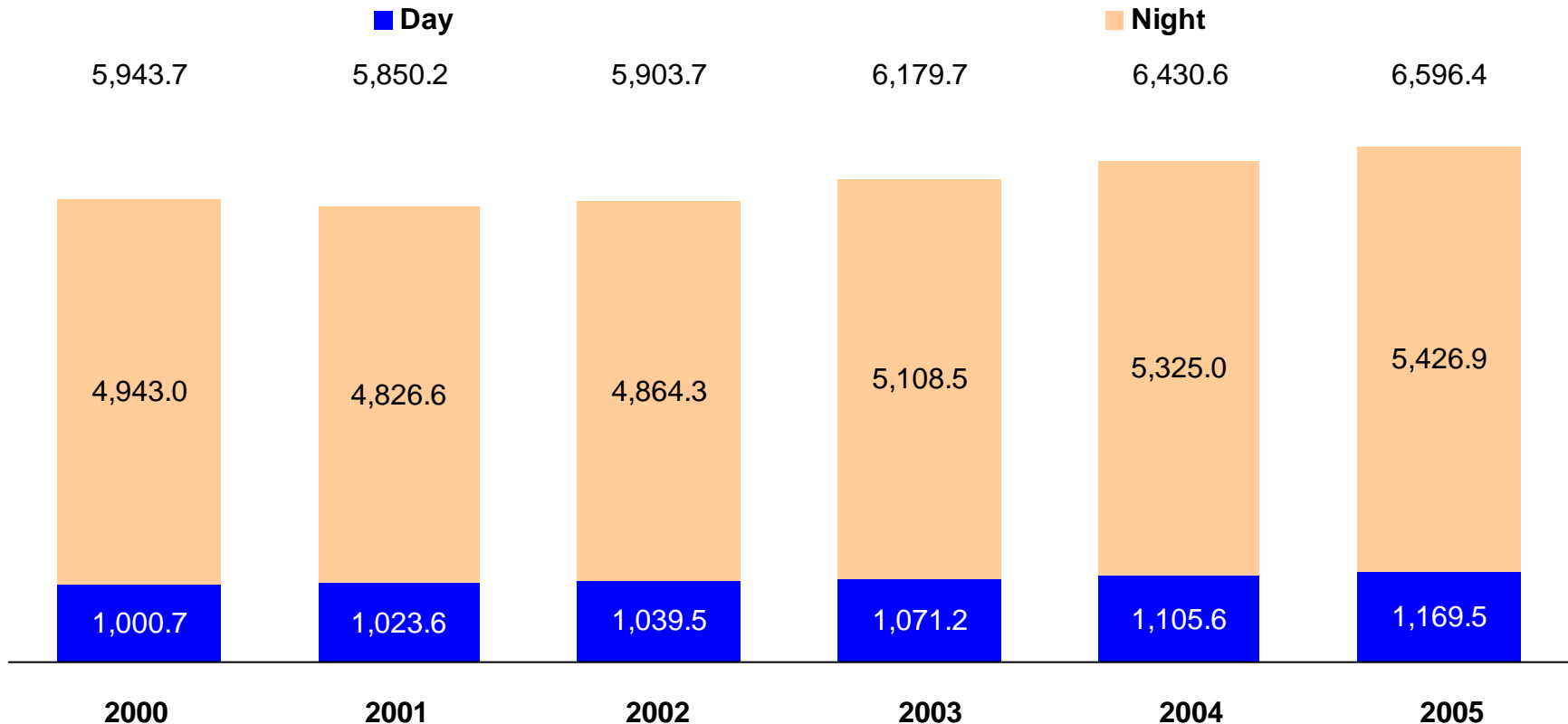
U.S. residents visiting U.S. destinations produced a record 6.60 billion person-days in 2005 (2.6%). The Business and Leisure segments contributed to the growth, both increasing at the rate of 2.6%, which is lower than their rates of 3.8% for Leisure and 4.9% for Business in 2004. As with Stays, the Business segment finally surpassed the high reached in 2000. Even though their growth rates were equal in 2005, Leisure was the main driver in the past five years, increasing 14.7% since 2000. Leisure's share of Person-Days volume has also increased from 74% in 2000 to 77% in 2005.



U.S. Person-Days Volume: Day vs. Overnight (2000-2005/Millions)



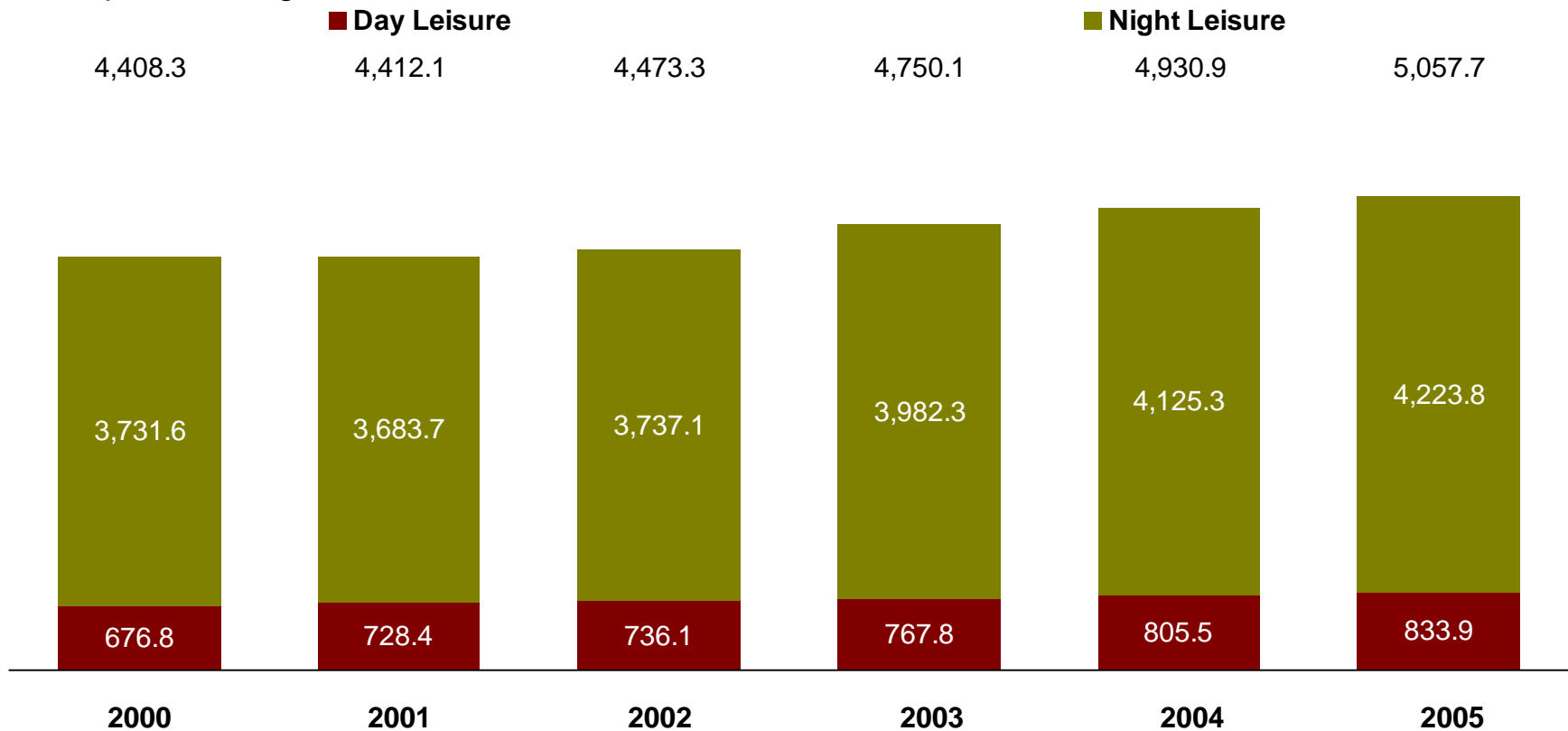
Demand for day trips grew 5.8% to 1.17 billion in 2005 and demand for Overnight trips grew 1.9% to 5.43 billion, both record highs. Over the past five years Overnight Person-Day demand grew 10% while Day Person-Days increased 17%. Accordingly, Day Person-Day's share of total Person-Days volume went from 17% in 2000 to 18% in 2005. Demand for Leisure Day Trips produced the second highest growth in all travel segments in Person-Days volume, signaling the major effect Day travel is having in the Industry while Overnight Person-Days remains strong.



U.S. Person-Days Volume: Day Leisure vs. Overnight Leisure (2000-2005/Millions)



U.S. residents produced the highest number of both Day Leisure and overnight leisure person-days in 2005. Demand for Day Leisure Person-Days grew 3.5% to 834 million in 2005 and demand for Overnight Leisure Person-Days grew 2.4% to 4.22 billion. Overnight share of all Leisure Person-Days was 84% in 2005 as it was in 2004. Demand for both Day and Overnight Leisure Person-Days softened in 2005 growing slower than in 2004 or 2003. 2005 growth surpassed the growth rates of 2002 and 2001.



U.S. Person-Days Volume: % Change by Travel Segment (2000-2005)



This table shows the year-to-year percent changes in person-days volume for each of the primary travel segments.

	01/00	02/01	03/02	04/03	05/04
Total	-1.6%	0.9%	4.7%	4.1%	2.6%
Business	-6.3%	-0.5%	-0.1%	4.9%	2.6%
Leisure	0.1%	1.4%	6.2%	3.8%	2.6%
Day	2.3%	1.5%	3.1%	3.2%	5.8%
Night	-2.4%	0.8%	5.0%	4.2%	1.9%
Day Business	-8.9%	2.8%	0.0%	-1.1%	11.9%
Day Leisure	7.6%	1.1%	4.3%	4.9%	3.5%
Night Business	-5.7%	-1.4%	-0.1%	6.5%	0.3%
Night Leisure	-1.3%	1.5%	6.6%	3.6%	2.4%

U.S. Person-Days Volume Intelligence



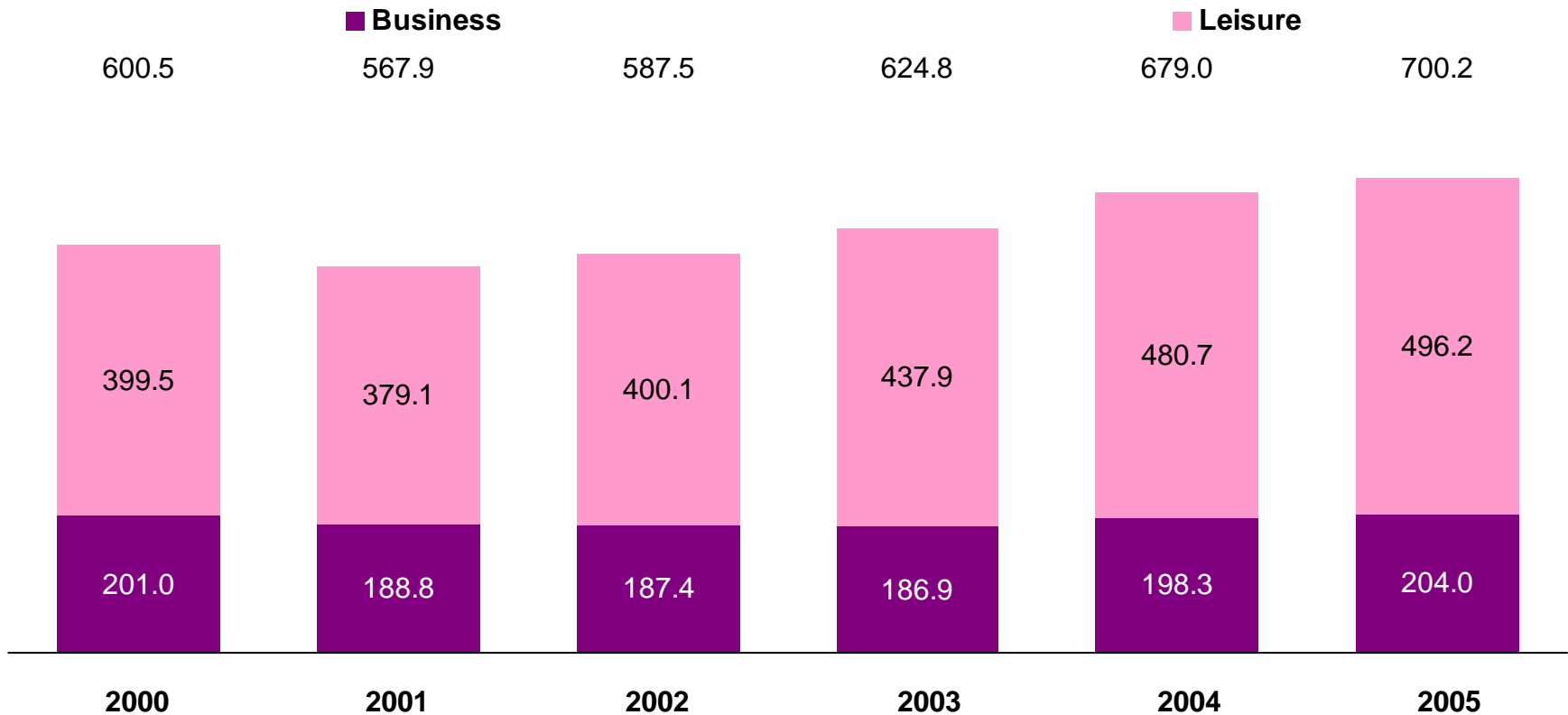
- Person-Days volume reflects the addition of two components to Person-Stays: stay length and a “Day factor”
- Person-Days increased 2.6% in 2005 to a record 6.60 billion due to
 - 1) the increase in Travel Party, and
 - 2) an increase in Average Party size
- Person-Days grew at a less robust pace than the previous year because of a
 - 1) decrease in average length of stay, and
 - 2) increase in share of Day travel
- Compared to Person-Days growth in 2004, this year’s growth was not as significant because average stay length decreased 3.9% for Business and 0.6% for Leisure. For this reason, Person-Stays growth supercedes that of Person-Days in 2005.
- Within Person-Days, the U.S. Travel Industry is still growing, but the number of Nights on a trip is not growing as fast as the number of people on a Stay or the number of Stays per trip.

U.S. Direct Spending: Business vs. Leisure (2000-2005/\$billions)



U.S. residents traveling domestically spent a record breaking \$700 billion, up 3.1% from 2004. Both Business and Leisure segments contributed to the growth (2.9% vs. 3.2%). Spending growth softened in 2005 as travel prices rose (5.3%*) faster than the rate of spending growth. Leisure direct spending has increased each year since 2001, whereas Business only experienced a two year positive trend starting last year.

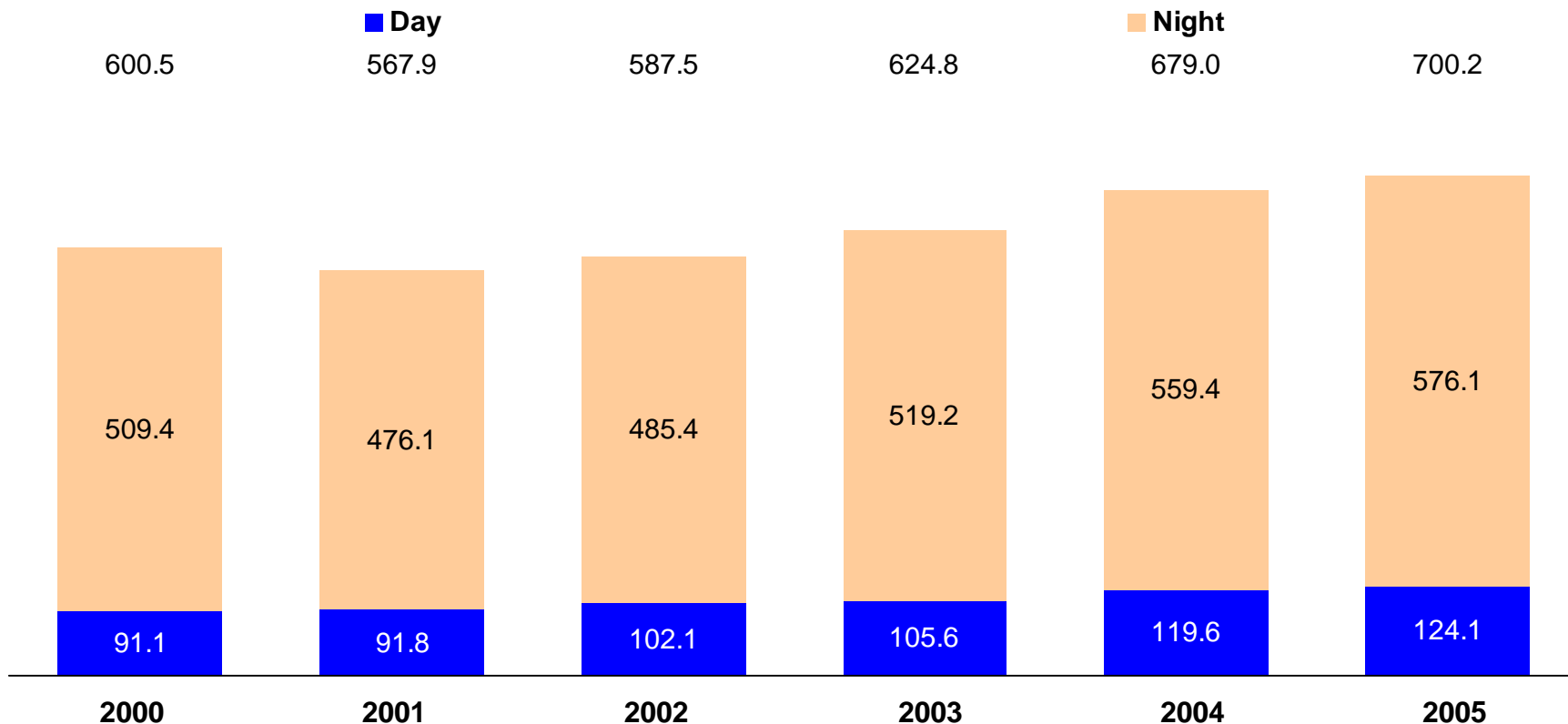
* Source: Travel Industry Association of America (TIA) and U.S. Department of Labor



U.S. Direct Spending: Day vs. Overnight (2000-2005/\$ billions)



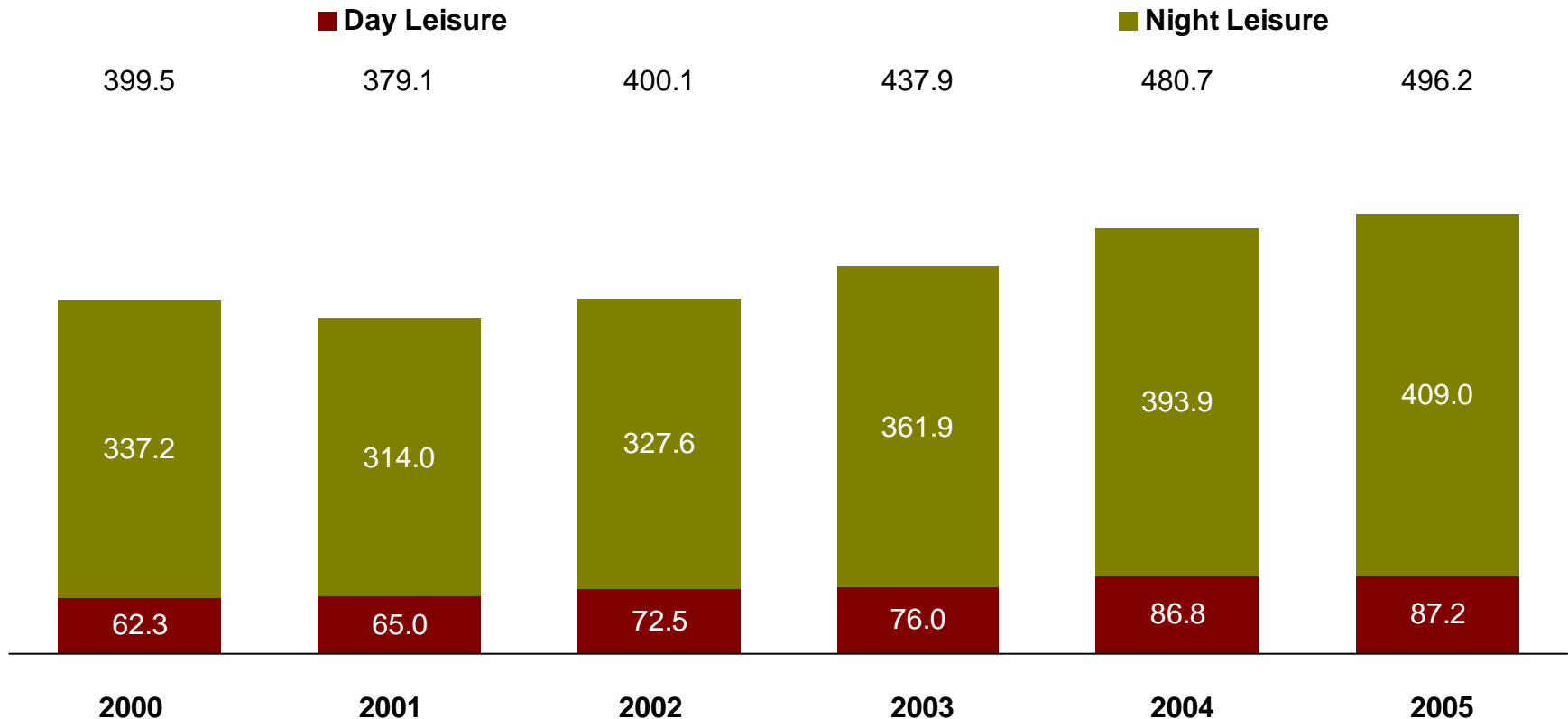
U.S. residents produced new spending records on both Day and Overnight Trips in 2005. Traveler spending on day trips jumped 3.7% to \$124 billion in 2005, while Traveler spending on Overnight trips grew 3% to \$576 billion. Both segments grew since 2000 at high rates (Day: 36%; Overnight: 13%), contributing fairly equally to recent growth in U.S. direct spending. Overnight share of all Direct Spending was a low 82% in 2005, down from 85% in 2000. As with other weights, the Day segment shows more strength compared to the Overnight segment.



U.S. Direct Spending: Day Leisure vs. Overnight Leisure (2000-2005/\$billions)



Leisure Day spending grew 0.4% to \$87 billion in 2005 and overnight leisure spending grew 3.8% to \$409 billion. Since 2000, there has been a higher percentage of spending growth in the smaller Day Leisure segment compared to the larger overnight leisure segment (40% vs. 21%). When inflation is taken into consideration, net spending growth has declined 1.6% for day trips and declined 2.3% for Overnight trips since 2000.



U.S. Traveler Direct Spending: % Change by Travel Segment (2000-2005)



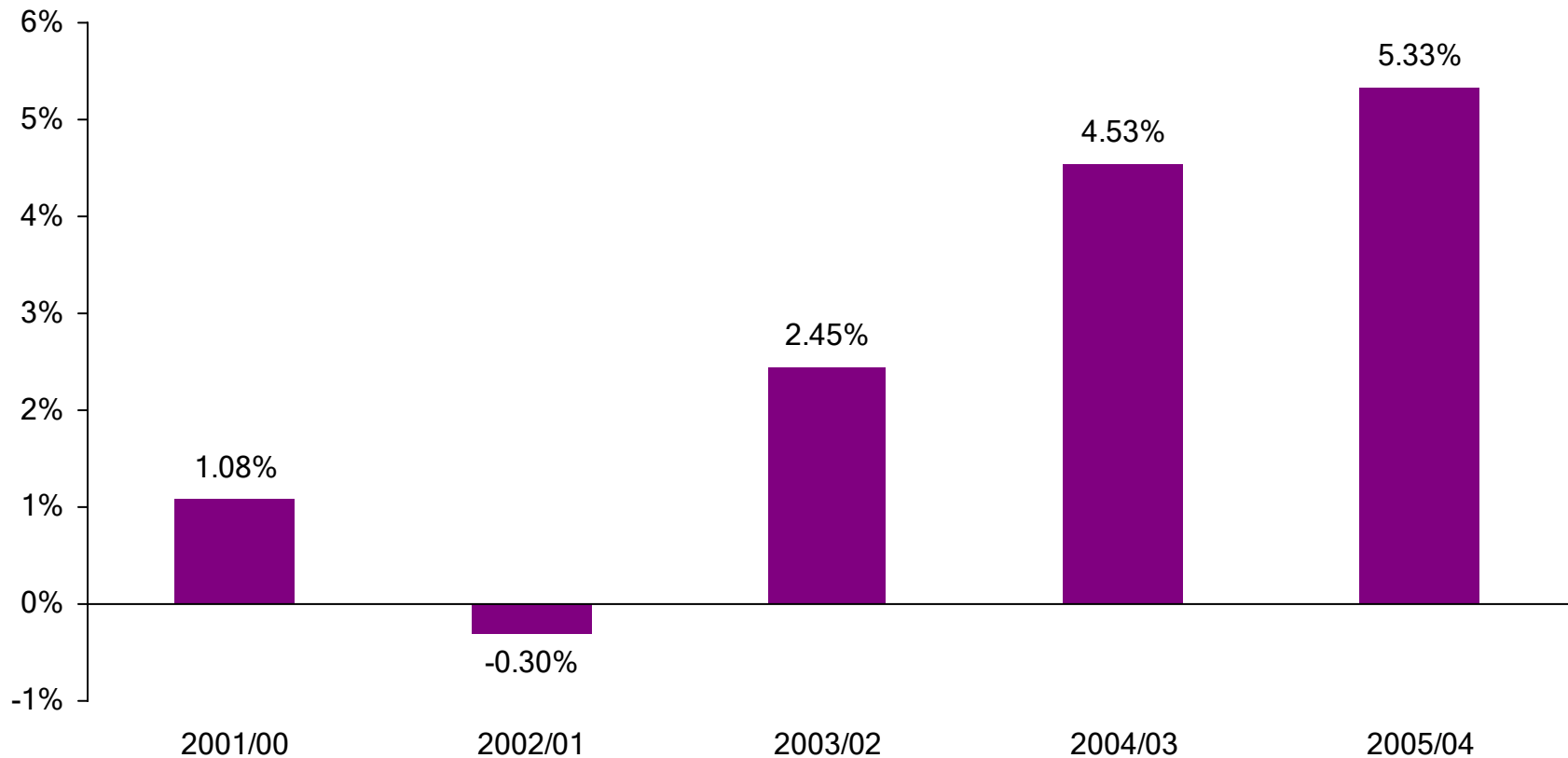
This table shows the year-to-year percent changes in traveler direct spending for each of the primary travel segments.

	01/00	02/01	03/02	04/03	05/04
Total	-5.4%	3.4%	6.4%	8.7%	3.1%
Business	-6.0%	-0.8%	-0.2%	6.1%	2.9%
Leisure	-5.1%	5.5%	9.5%	9.8%	3.2%
Day	0.8%	11.2%	3.4%	13.3%	3.7%
Night	-6.5%	1.9%	7.0%	7.7%	3.0%
Day Business	-7.1%	10.7%	0.1%	10.6%	12.6%
Day Leisure	4.4%	11.5%	4.8%	14.3%	0.4%
Night Business	-5.9%	-2.7%	-0.3%	5.2%	1.0%
Night Leisure	-6.9%	4.3%	10.5%	8.8%	3.8%

U.S. Travel Price Index: Annual Change (2000-2005/%)



* Source: Travel Industry Association of America (TIA) and U.S. Department of Labor



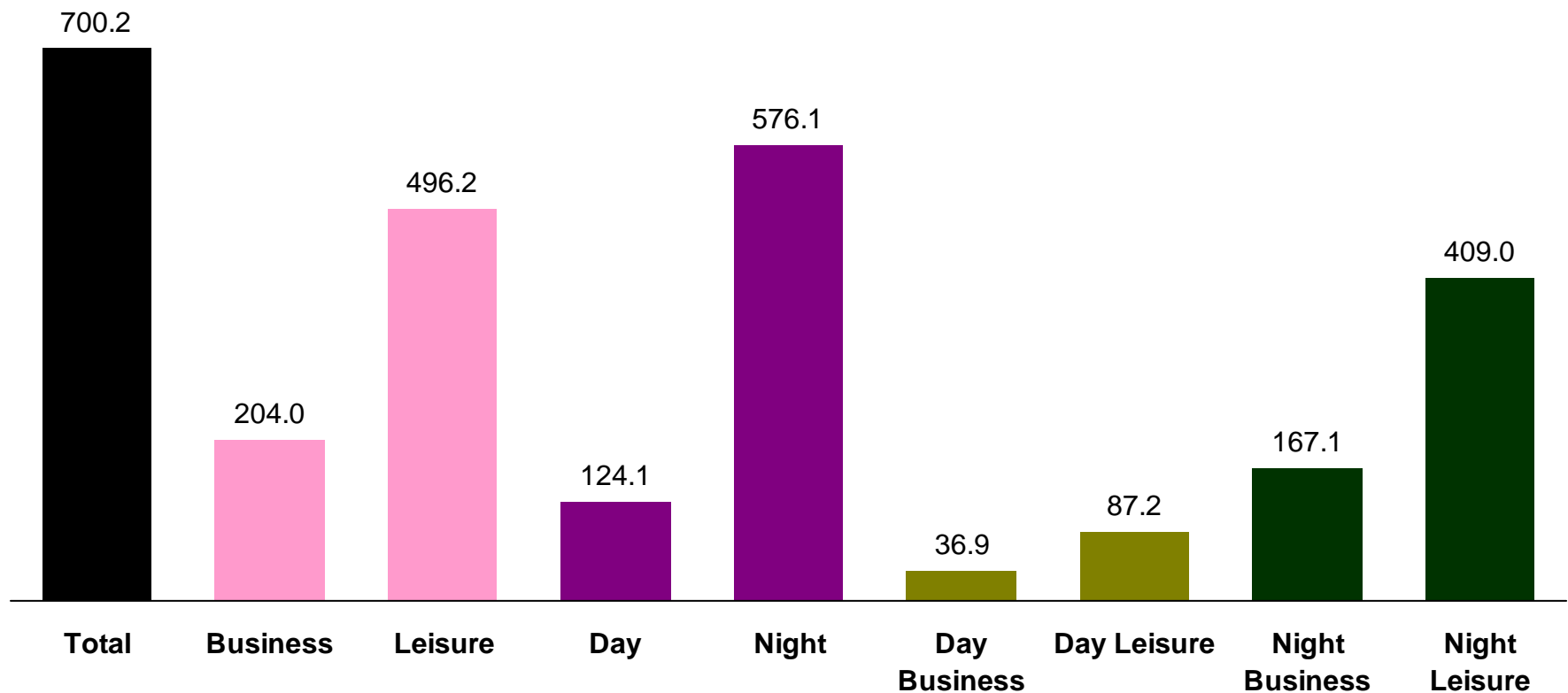


- Traveler spending grew a moderate 3.1% in 2005 to a record \$700 billion due to the 2.8% increase in the number of Stays coupled with a 0.3% increase in average party spending. Party spending is higher due to increases in average party size; that increase was able to offset the decrease in average stay length.
- 2005 also brought higher prices for many goods and services catering to travelers such as gasoline, hotel room rates, food & beverage, and entertainment.
- Traveler spending has grown each year of the past 12 years except in 2001. Since 2000, the growth is entirely attributed to the leisure segment, which has since grown steadily. Conversely, the business spending continued to decline from 2000 to 2003 and in 2005 it finally surpassed the 2000 high of \$201 billion
- The increase in business direct spending was mainly driven by day business which grew a whopping 12.6%, followed by a 3.8 increase in night leisure (which makes up a large share (58%)) of total direct spending. Leisure experienced a 3.7% increase in day direct spending
- As with person-stays and stays, the day and leisure segments have been making headlines in 2005.

U.S. Direct Spending Summary (2005/\$billions)

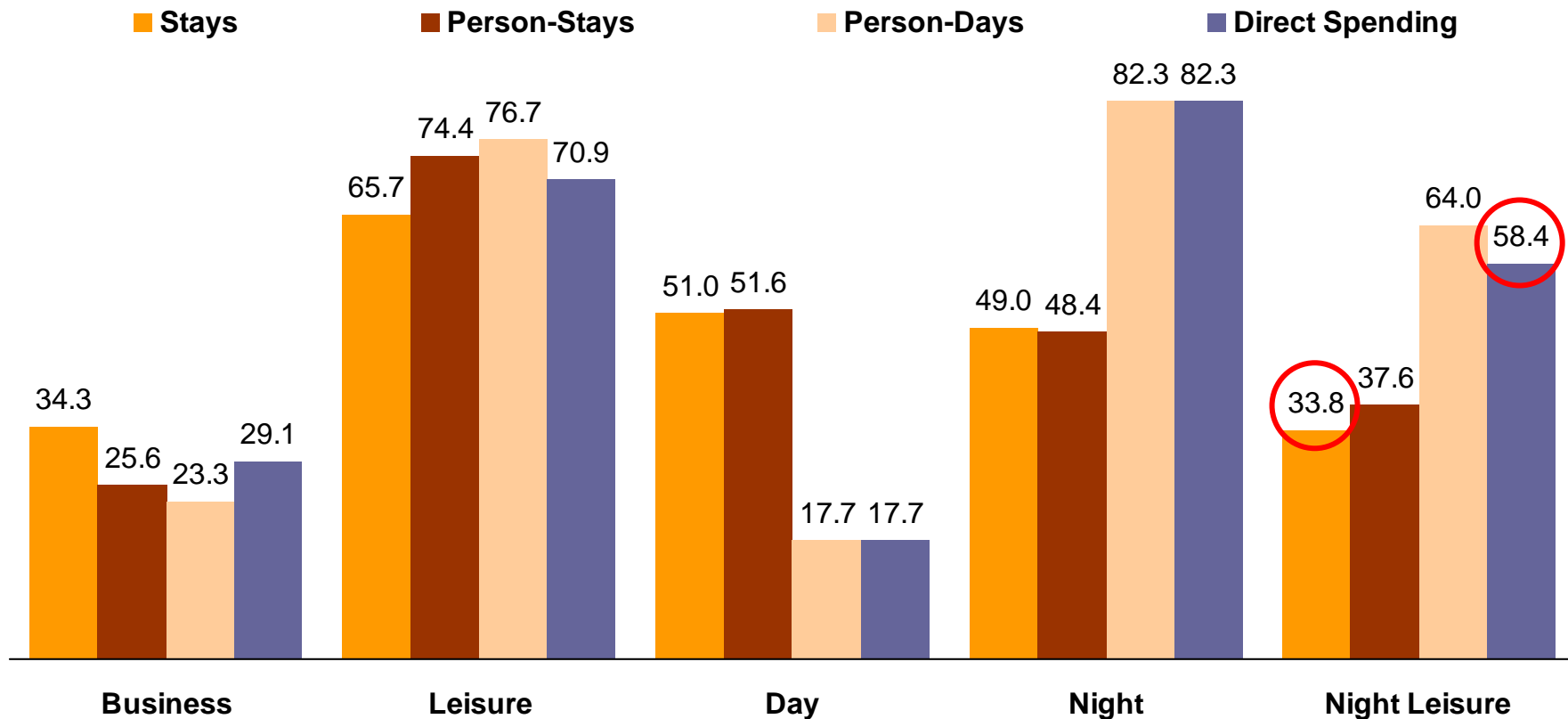


This chart summarizes U.S. traveler spending for each of the travel segments discussed in this report. Direct spending (not indirect or induced spending impacts) includes spending by travelers on transportation, accommodations, food and beverage, shopping, entertainment, and other miscellaneous purchases.





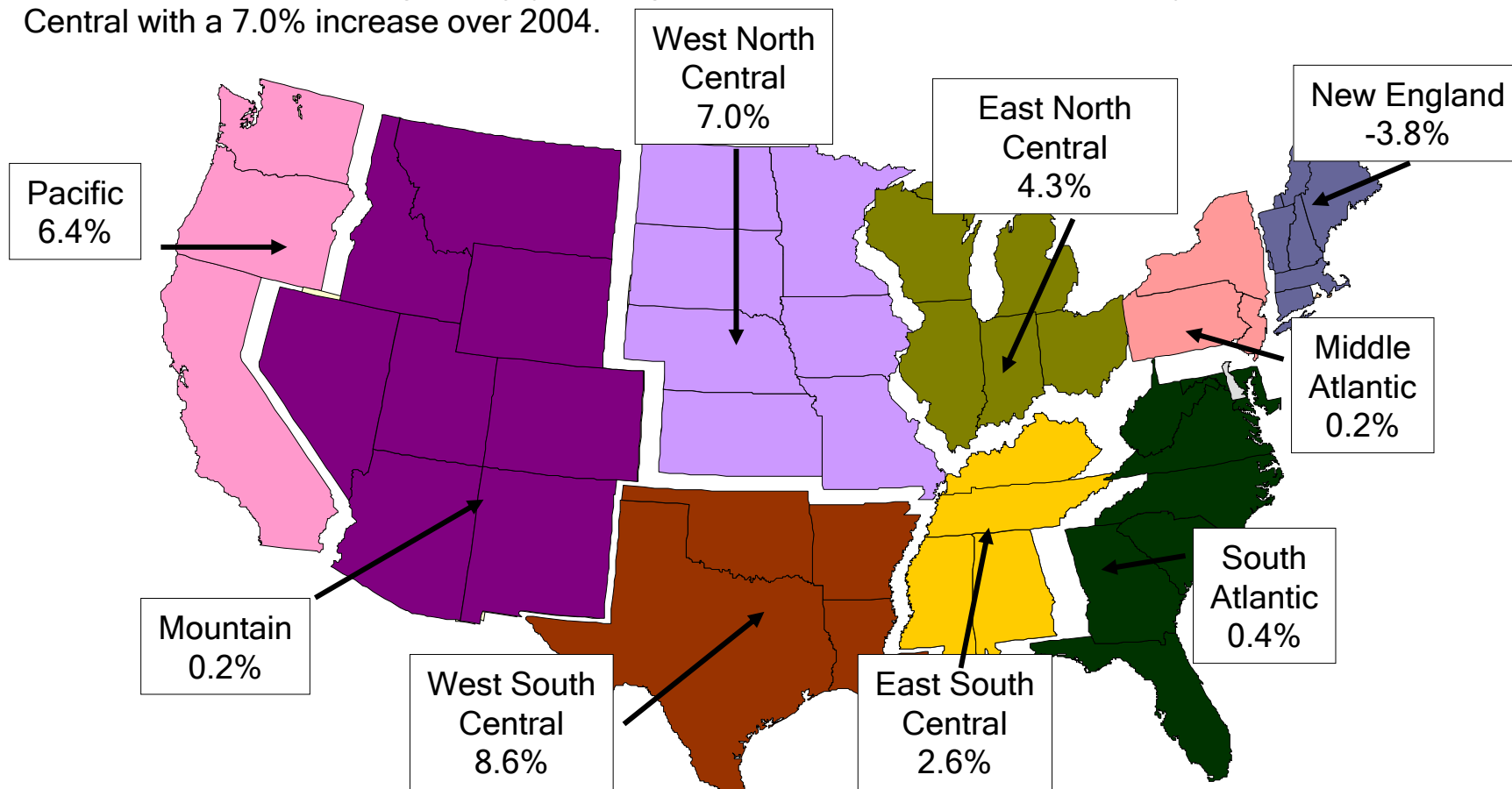
This chart shows each travel segment's proportion of each of the four volume measure totals—Stays, Person-Stays, Person-Days, and Direct Spending. Overnight leisure, the focus of this study, is 34% of U.S. travelers, but 58% of the money spent by travelers.



U.S. Travel Volume Change by Region (2005/% of Overnight Leisure Person-Stays)



The U.S. Bureau of Census groups the 50 states + D.C. into nine regions for the purpose of reporting government statistics. The map below details which regions had the highest growth rate of overnight leisure Person-Stays between 2004 and 2005. Compared to the U.S., which grew 3.0, the West South Central region enjoyed the greatest increase of 8.6% followed by West North Central with a 7.0% increase over 2004.





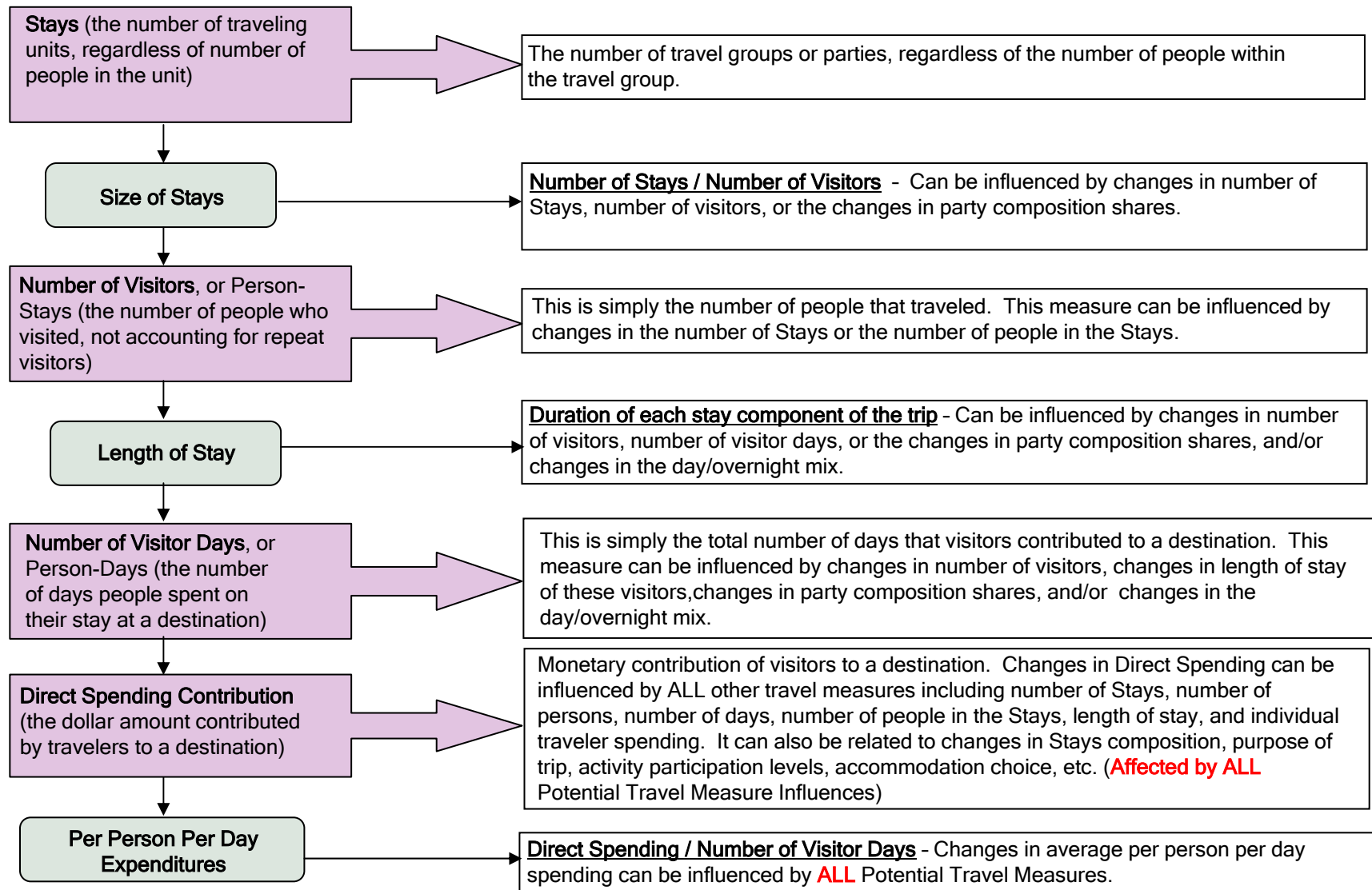
Source: Utah Travel and Adventure
<http://www.Utah.com>

Key Market Assessment Summary – Understanding the Travel Measures



- It is important to understand the various ways in which to measure a destination's travel market performance.
- Visitation to a market can be measured in terms of seven key, inter-related travel measures outlined on the following page.
- Changes in five of these travel measures are caused by changes in other related travel measures. The following graphic depicts how these travel measure variables are related to each other.

When interpreting your destination travel data, remember to consider how the travel measures are interrelated to determine drivers of changes in your travel marketplace.



Utah Volume Changes Explained



		2004	2005	% Change	
Stays (millions)	Total	10.1	10.1	0.2%	A comparison of Utah State's total travel market in 2005 and 2004 showed increases in number of visitors, average party size, average party spending, average daily per person spending and total Direct Spending, but declines in average stay length.
	Business	3.0	2.8	-5.5%	
	Leisure	7.2	7.3	2.5%	
Average Party Size (persons)	Total	3.00	3.08	2.5%	The flat performance in Stays volume resulted from the small increase in the larger leisure travel party volume which offset the larger decrease of 5.5% in the much smaller business travel party volume. The 0.2% increase in Stays volume coupled with a 2.5% increase in Average Party Size produced a growth of 2.6% in travelers in 2005.
	Business	2.09	2.26	8.2%	
	Leisure	3.39	3.39	0.2%	
Visitors (Person-Stays) (millions)	Total	30.4	31.2	2.6%	The number of visitor days also showed little change in 2005 over 2004. As for the Stays volume, an increased Person-Stay volume coupled with a decreased total average stay length, produced a similar Visitor Days volume increasing only 0.4% from 2004.
	Business	6.2	6.3	2.3%	
	Leisure	24.2	24.9	2.7%	
Average Stay Length (Travel Parties/0+ days)	Total	2.27	2.22	-2.1%	Direct spending by travelers increased, a result of many influences including the increase in Stays, visitors, and visitor days.
	Business	2.59	2.58	-0.5%	
	Leisure	2.18	2.13	-2.6%	
Visitor Days (Persons Days) (millions)	Total	69.0	69.3	0.4%	Please refer to adjacent chart for specific changes in the business and leisure segments from 2004 to 2005.
	Business	16.1	16.3	1.7%	
	Leisure	52.9	52.9	0.0%	
Day/ Overnight Mix (% Day Trips)	Total	47%	50%	6.5%	
	Business	36%	39%	7.1%	
	Leisure	52%	55%	5.6%	
Average Party Spending (\$)	Total	591.2	626.2	5.9%	
	Business	715.2	791.0	10.6%	
	Leisure	539.7	563.2	4.3%	
Total Direct Spending (\$ billions)	Total	6.0	6.4	6.1%	
	Business	2.1	2.2	4.5%	
	Leisure	3.9	4.1	7.0%	
Spending per Person per Day (\$)	Total	86.8	91.7	5.6%	
	Business	132.3	136.0	2.7%	
	Leisure	73.0	78.0	6.9%	

Utah Stays Volume Trends



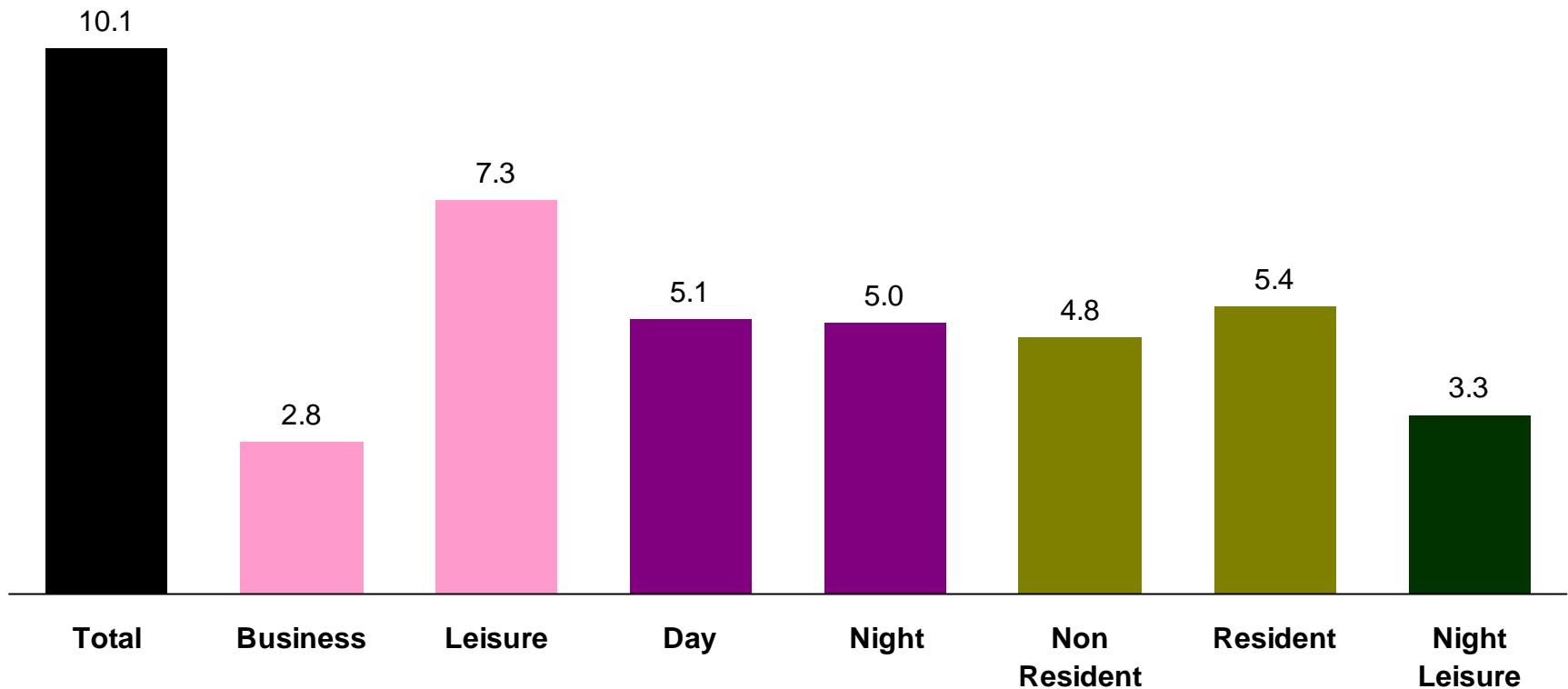
- The following section will detail the Stays volume trend in Utah over the last six years. Stays volume measures the number of groups that visited a market.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 1 Stays

Utah Stays Volume Summary (2005/Millions)



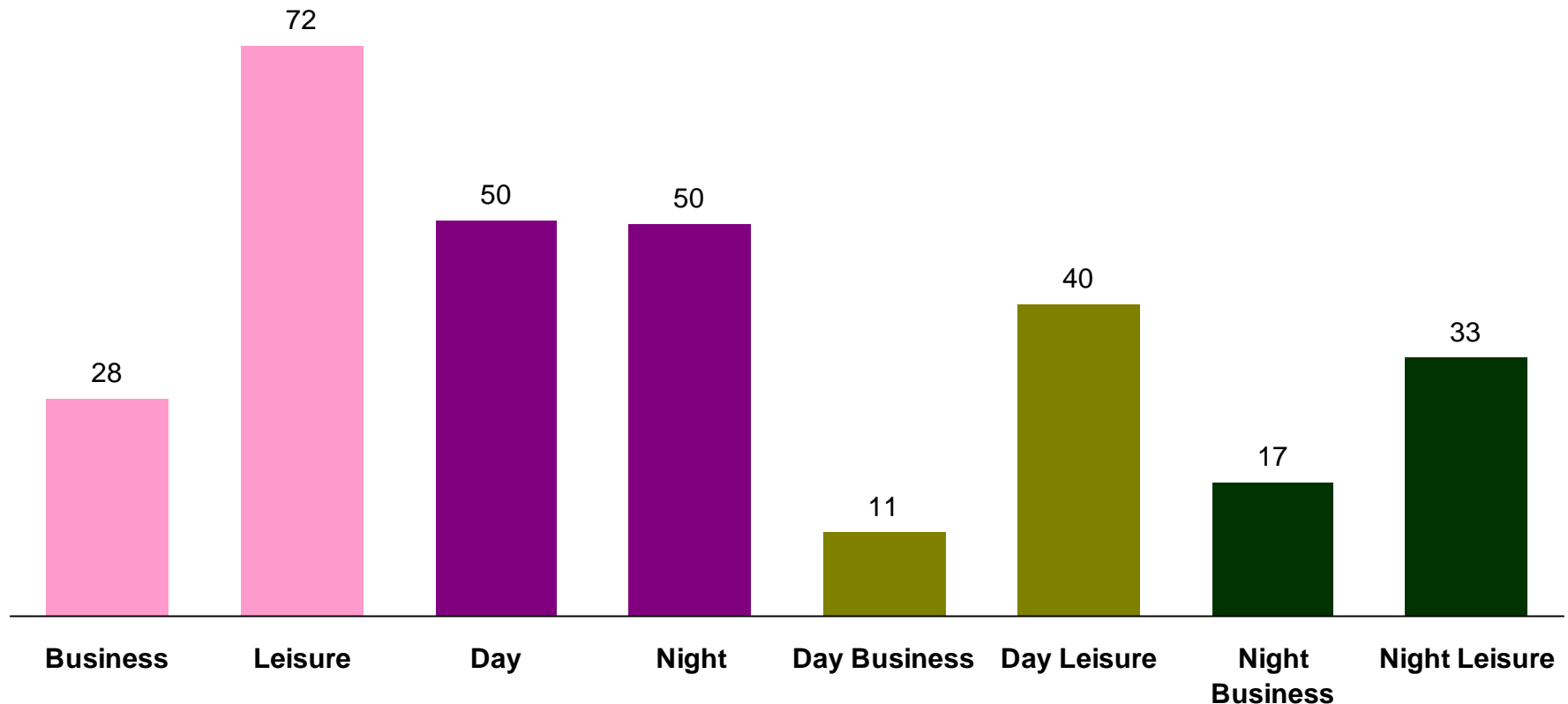
This chart shows Stays volume for each of the major travel segments. Utah received a total of 10.1 million Stays in 2005 with the leisure travel parties outnumbering business Stays by 4.5 million. Day Stays accounted for 5.1 million travel parties while overnight Stays provided slightly fewer travel parties (5.0 million), which was comprised of 3.3 million of overnight leisure stays. Among the 10.1 million Stays volume, 4.8 million were non-resident travel parties while 5.4 million were resident travel parties.



Utah Stays Volume Summary (2005/% of Total Volume)



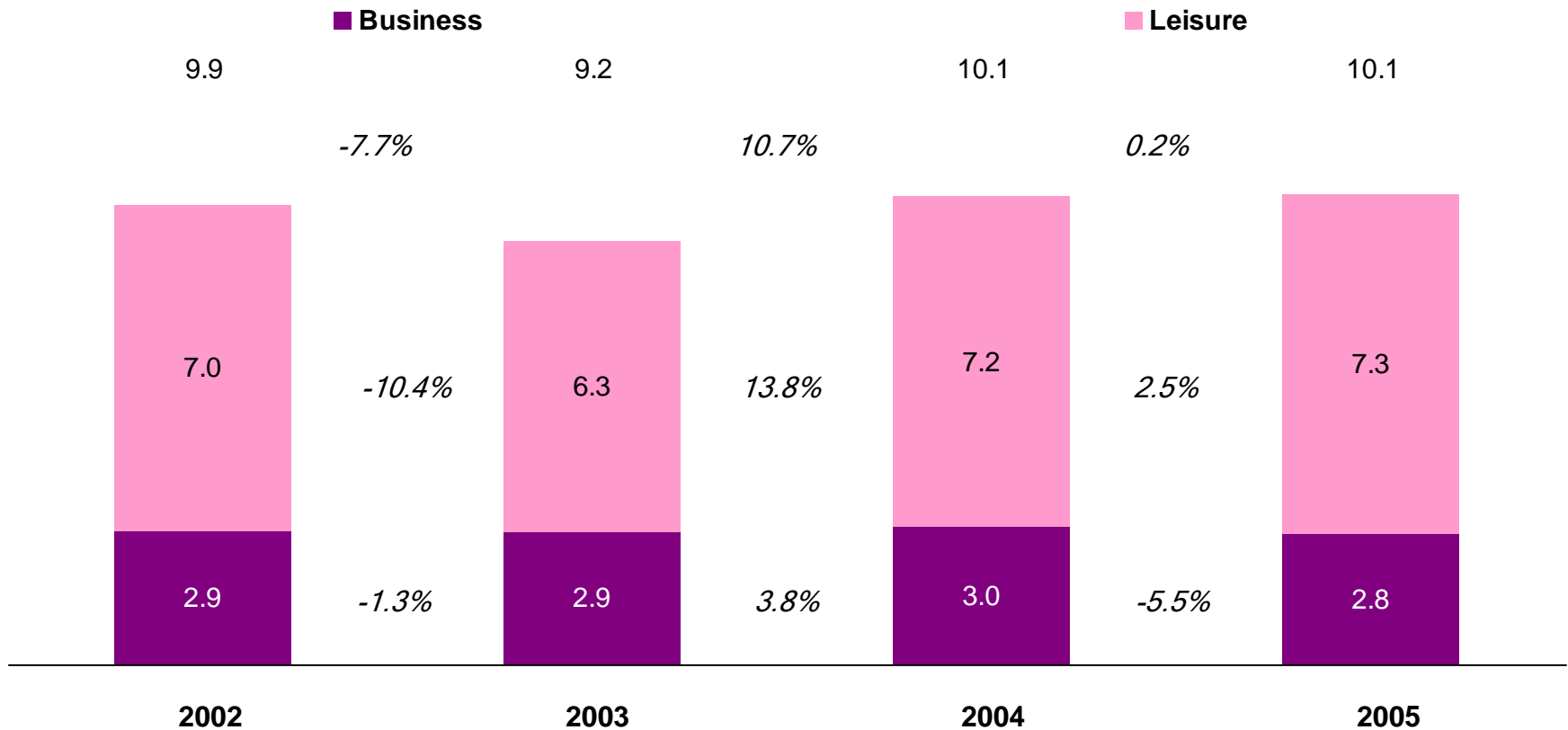
This chart shows the proportion of total Utah Stay volume for each of the travel segments. Leisure Stays (72%) were more dominant in terms of the share of the total Stay volume than business Stays (28%). However, such vast differences did not exist in the day/overnight (50% vs. 50%) and non-resident/resident (47% vs. 53%) segment shares. Overnight leisure travel parties comprised one-third of total Utah travel party volume in 2005.



Utah Stays Volume: Business vs. Leisure (2002-2005/Millions)



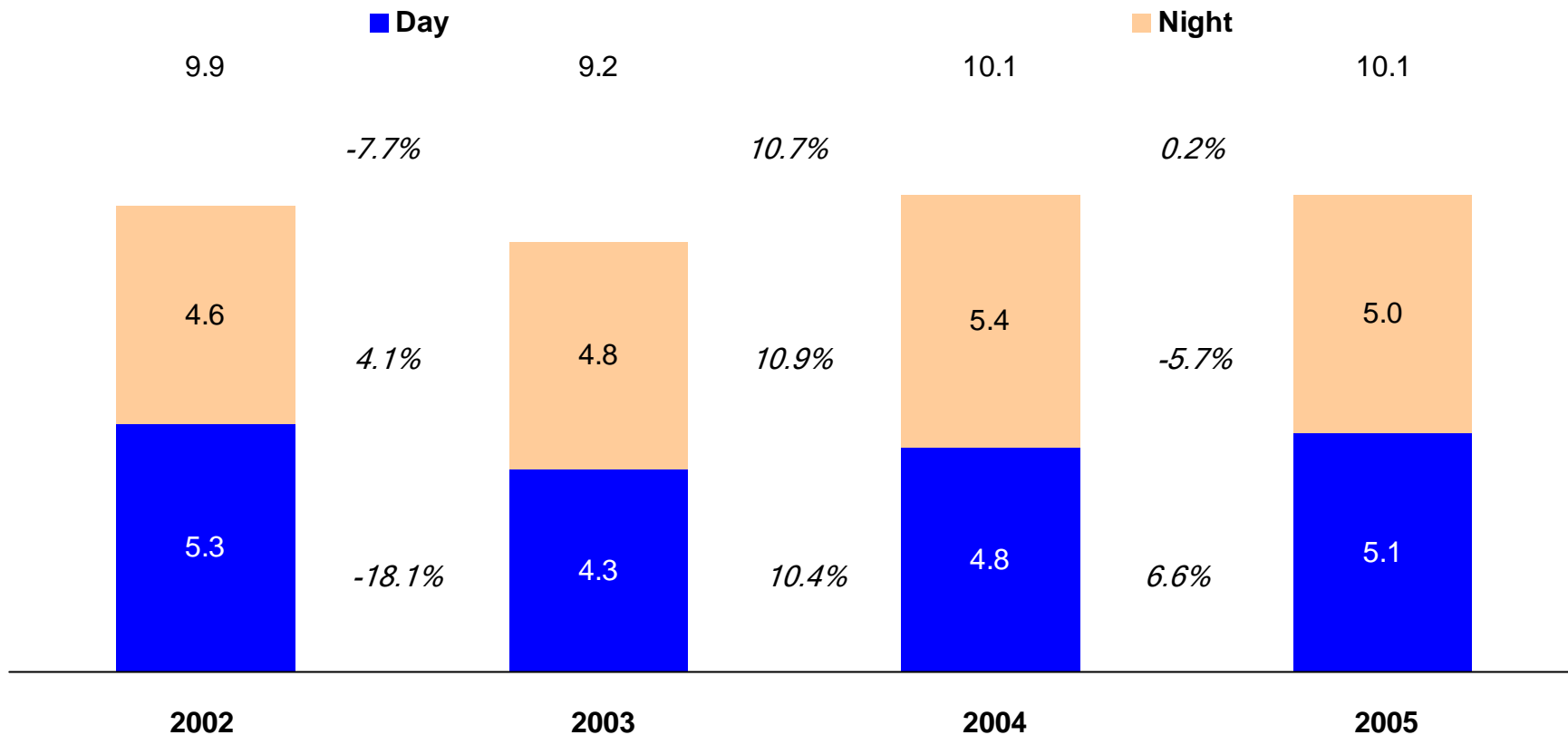
Utah Stay volume only increased 0.2% from 2004 to 2005 after the large increase from 2003 to 2004 (10.7%). The large decrease 5.5% in the smaller business travel party volume was offset by the 2.5% increase in the larger leisure travel party volume.



Utah Stays Volume: Day vs. Overnight (2002-2005/Millions)



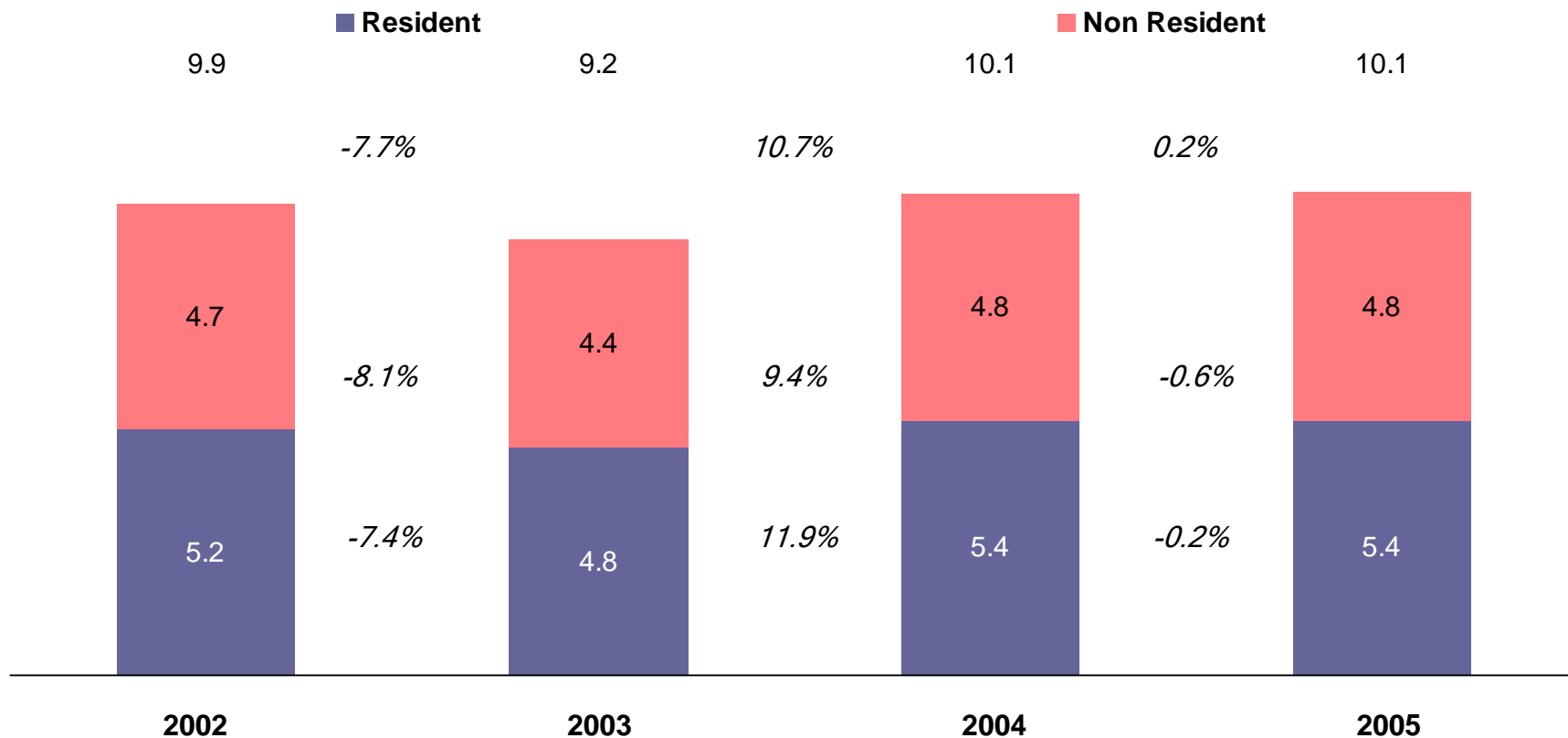
Utah day Stay volume increased (6.6%) from 2004 to 2005 while the overnight Stay volume decreased by 5.7%. Day Stay volume increased for the second year in a row, while overnight Stays decreased after a substantial increase (10.9%) from 2003 to 2004.



Utah Stays Volume: Resident vs. Non-Resident (2002-2005/Millions)



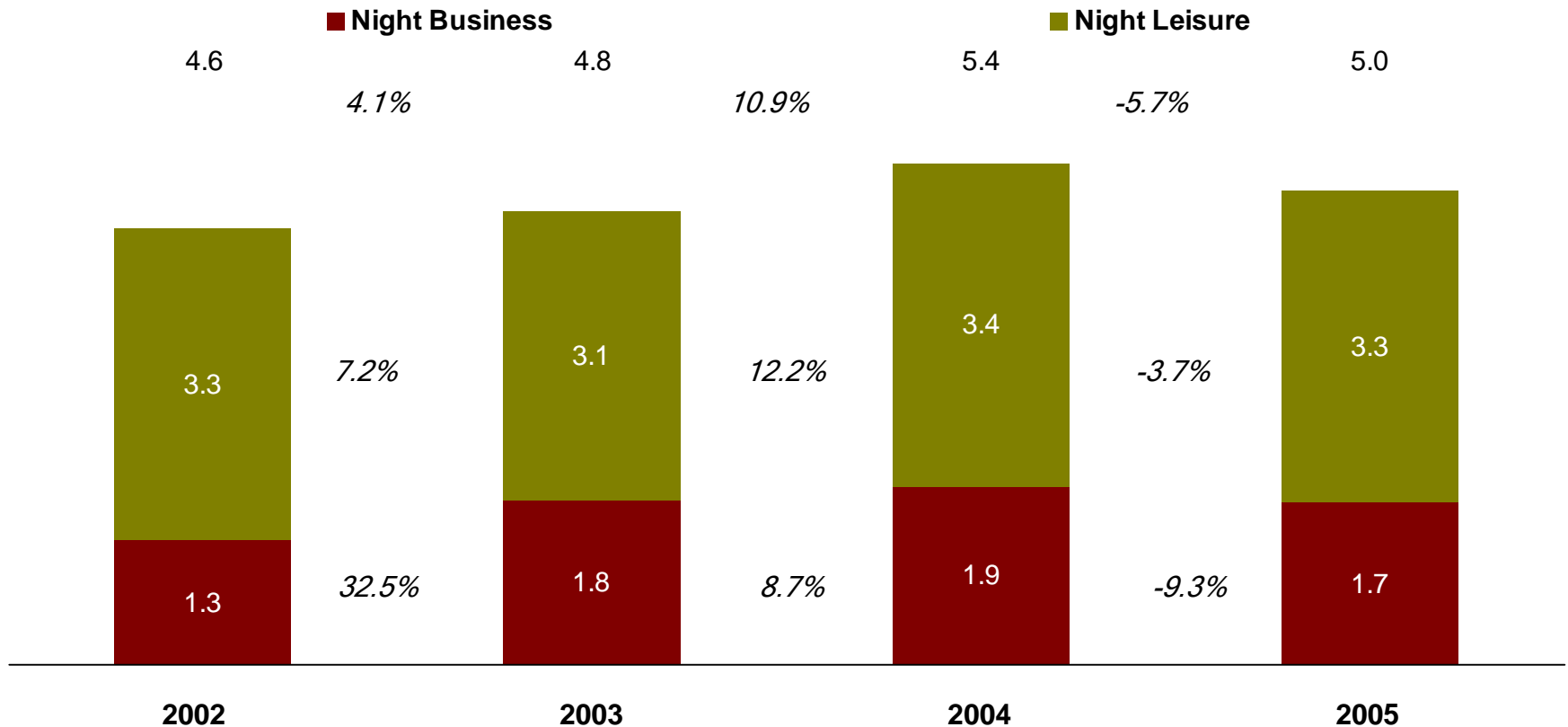
The resident and non-resident volumes remained almost unchanged from 2004 to 2005. The stagnation occurred after increases in both segments from 2003 to 2004.



Utah Stays Volume: Day Leisure vs. Overnight Leisure (2002-2005/Millions)



The decline in overnight travel party volume was driven by decreases in both the overnight business (-9.3%) and overnight leisure (-3.7%) Stays segments. However, both overnight leisure and overnight business travel parties grew from 2003 to 2004.



Utah Stays Volume: % Change by Travel Segment (2002-2005)



This chart shows the Stays volume year-to-year percent changes for travel segments discussed in this report. In particular, the total Stay volume remained about the same as it was in 2004. The leisure, day and non-resident Stays segments increased, 2.5%, 6.6% and 8.2%, respectively. Business, overnight, overnight business and overnight leisure Stays all decreased from 2004 to 2005.

	03/02	04/03	05/04
Total	-7.7%	10.7%	0.2%
Business	-1.3%	3.8%	-5.5%
Leisure	-10.4%	13.8%	2.5%
Day	-18.1%	10.4%	6.6%
Night	4.1%	10.9%	-5.7%
Night Business	-29.6%	-3.7%	1.2%
Night Leisure	-13.2%	15.2%	8.2%
Resident	-7.4%	11.9%	-0.2%
Non-Resident	-13.2%	15.2%	8.2%



Utah travel party volume reached 10.1 million travel parties in 2005, a flat performance of 0.2% following a large increase in 2004. The small 2005 growth was solely driven by growth in the leisure travel segments.

- After a year of increase in 2004, Business travel to Utah declined again, 5.5% to 2.8 million Stays in 2005.
- Leisure travel volume increased 2.5% over 2004, reaching 7.3 million Stays. Leisure volume in Utah is evenly comprised of overnight and day leisure travel parties, with overnight travel parties representing 45% of the leisure trips to the State, declining from 48% in 2004 following three stable years.
- Overnight Stays decreased 5.7% to 5.0 million, while day trips increased 6.6% to 5.1 million in 2005, surpassing overnight for the first time since 2002. Thus, the day trips' rebound since 2001 offset the decline in overnight trips.

Overall, Utah total Stays volume remained unchanged in 2005 over 2004, particularly in the resident (down 0.2%) and non-resident (up 0.6%) travel segments. Stays are an important measure to track since the travel party is the “unit” that travel marketers are trying to influence in their travel behavior.

Utah Person-Stays Volume Trends



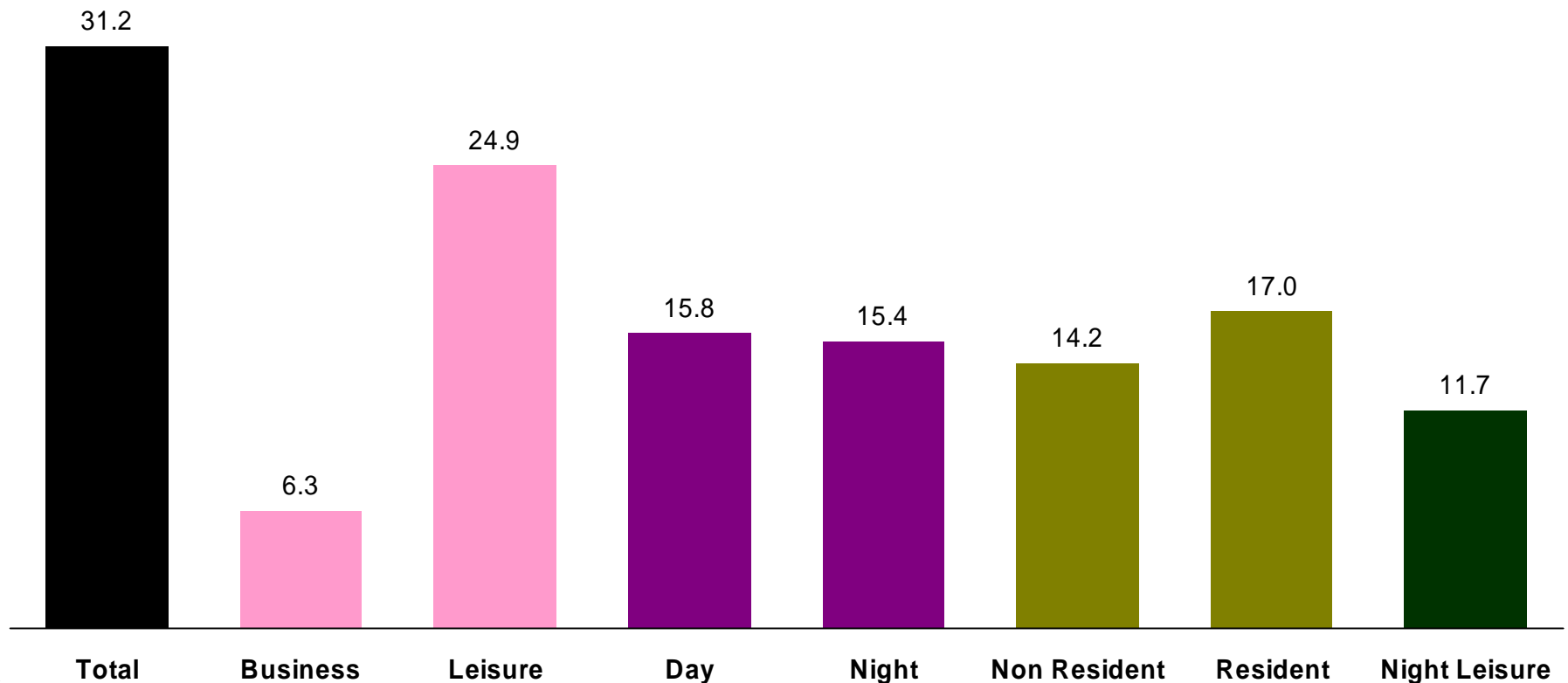
- The following section will detail the person-trip volume trend in Utah over the last six years. Person-Stays volume measures the number of people that traveled to a market and includes any repeat visits.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 2 Person-Stays.

Utah Person-Stays Volume Summary (2005/Millions)



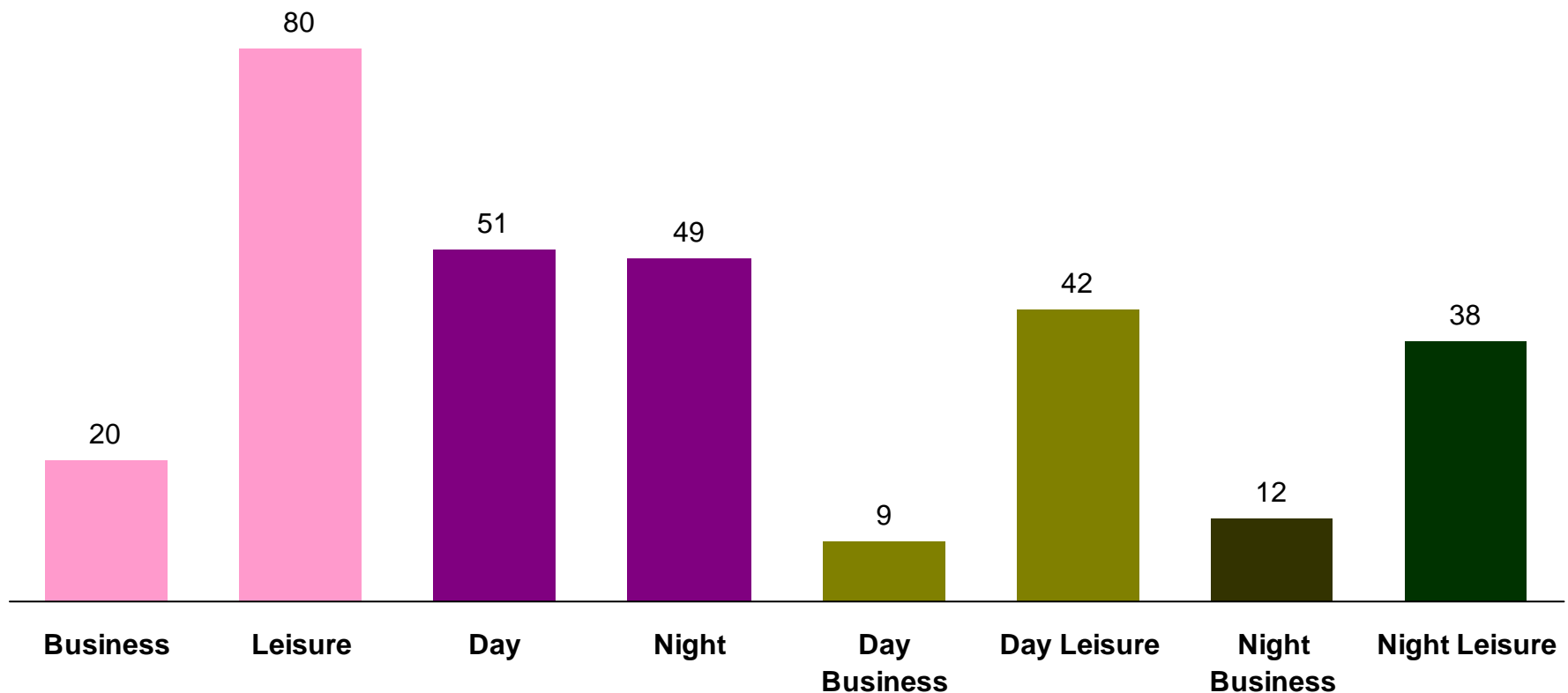
This chart shows person-Stays volumes across each of the major travel segments for the year 2005. Utah hosted a total of 31.2 million Person-Stays (visitors) in 2005, the vast majority of which were leisure visitors (24.9 million). Similar to the day vs. overnight distribution in Stays volume, both segments were close in numbers of visitors in 2005, 15.8 million and 15.4 millions respectively. Overnight business travelers represented 3.7 million Person-Stays, not represented in this graph.



Utah Person-Stays Volume Summary (2005/% of Total Volume)



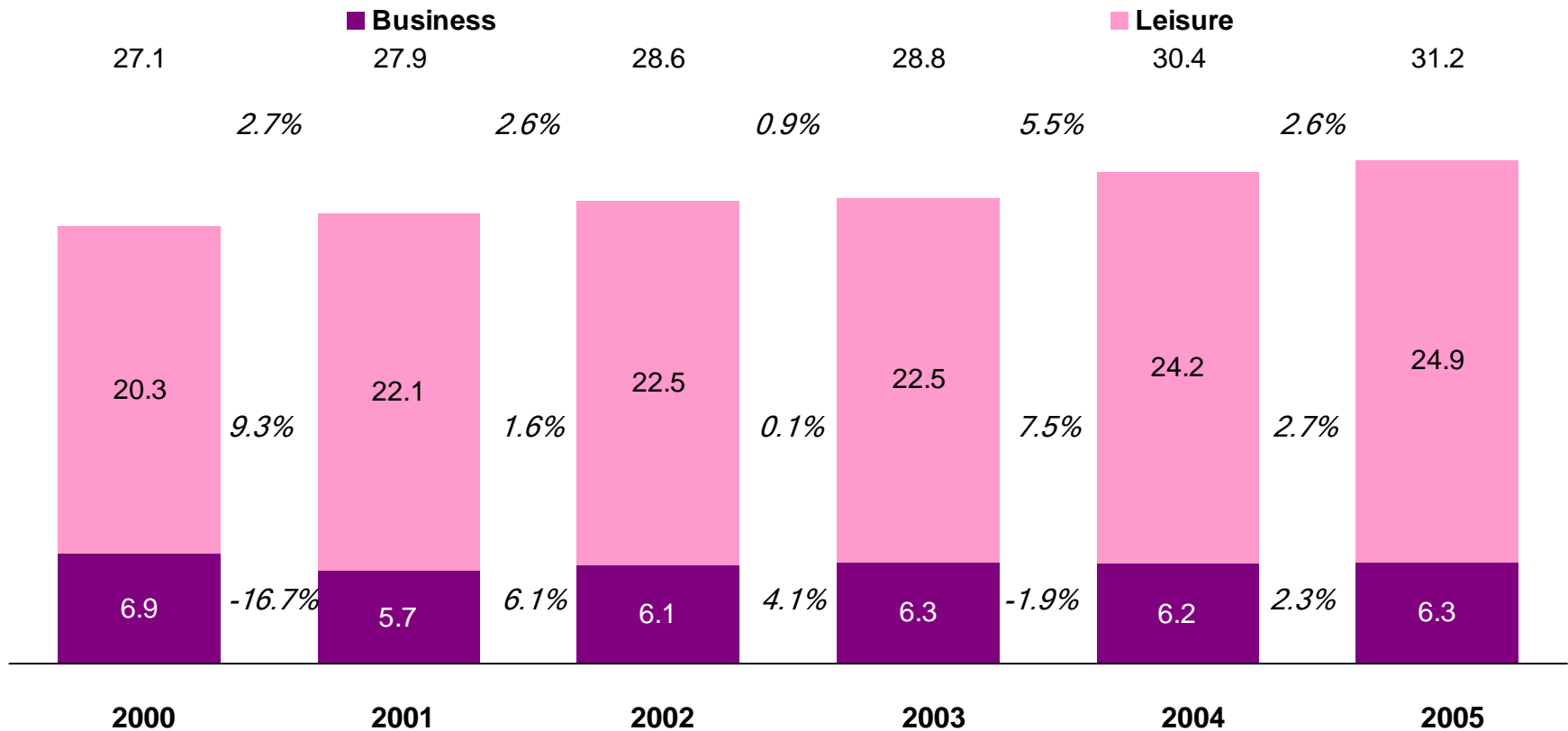
This chart shows the proportion of total Person-Stays of each travel segment. As with Stays volume, leisure Person-Stays greatly outweighed business Person-Stays in terms of share of the total travel market in 2005 (80% vs. 20%). The distribution of day/overnight and resident/non-resident Person-Stays was considerably more uniform. Overnight leisure Person-Stays volume represented 38% of total Utah Person-Stays in 2005.



Utah Person-Stays Volume: Business vs. Leisure (2000-2005/Millions)



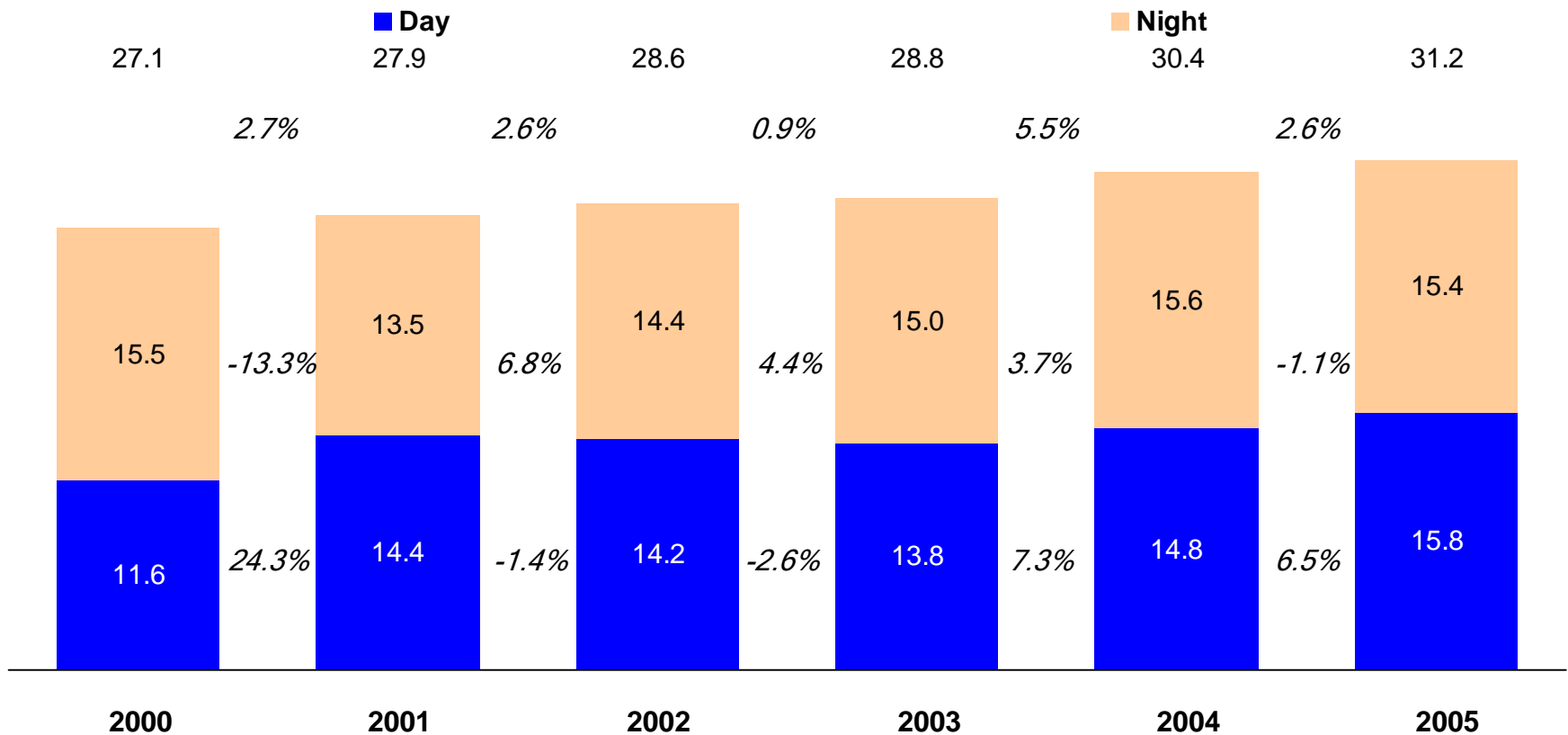
Utah's total Person-Stays volume increased 2.6% from 2004 to 2005 and was driven by the increases in both leisure and business Person-Stays. Leisure Person-Stays volume increased for the fifth consecutive year, while business Person-Stays volume declined in 2004 after two consecutive years of growth.



Utah Person-Stays Volume: Day vs. Overnight (2000-2005/millions)



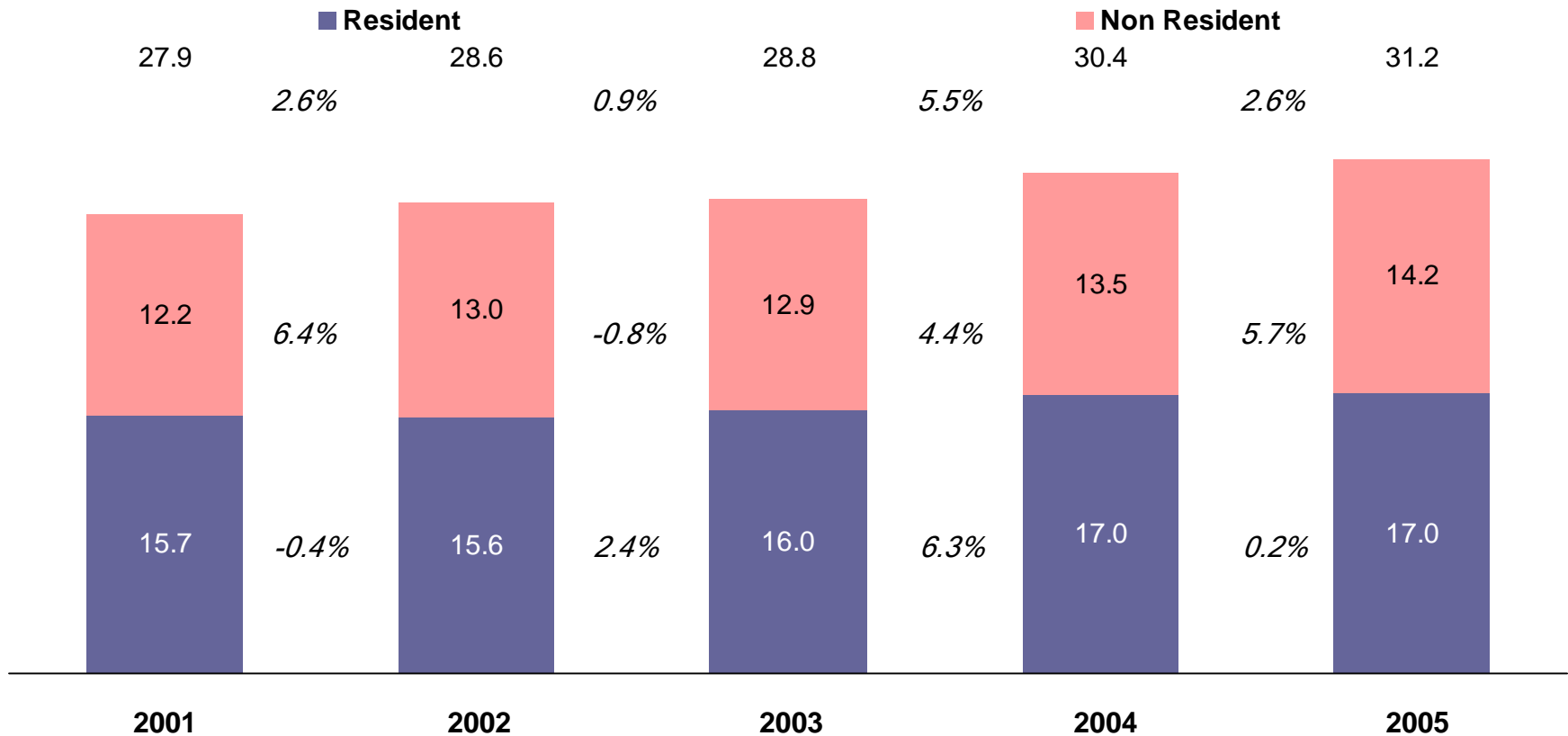
Utah day Person-Stays volume increased (6.5%) from 2004 to 2005, while overnight Person-Stays volume decreased slightly (1.1%). Day volume increased for the last two years after two consecutive years of decline, which followed a huge surge in 2001 over 2000. Overnight volume decreased for the first time since 2001.



Utah Person-Stays Volume: Resident vs. Non-Resident (2001-2005/Millions)



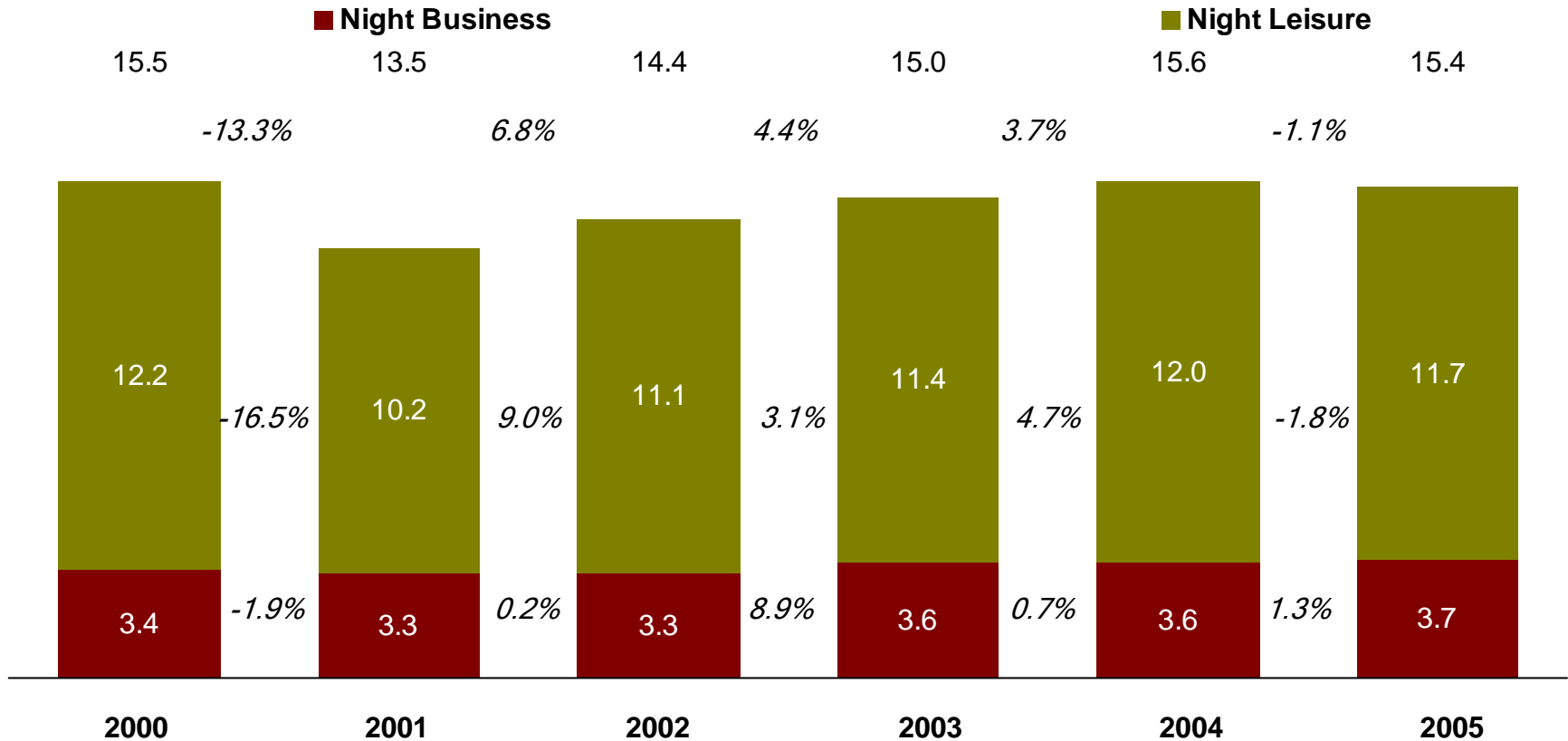
The slightly smaller non-resident Person-Stays volume increased 5.7% from 2004 to 2005, while the larger resident Person-Stay volume segment remained about the same. Residents grew at a slower rate than non-residents from 2004 to 2005, but they comprised a slightly higher share of the total Person-Stays (visitors) market.



Utah Person-Stays Volume: Day Leisure vs. Overnight Leisure (2000-2005/millions)



The 1.1% decrease in total overnight Person-Stays was driven by the 1.8% decrease in overnight leisure Person-Stays from 2004 to 2005, the first decline since 2001. Overnight business Person-Stay volume continuously increased since 2001, but the 1.3% growth in 2005 was not enough to offset the 1.8% decline in the total overnight leisure Person-Stays volume.



Utah Person-Stays Volume: % Change by Travel Segment (2000-2005)



This chart shows the Person-Stays volume year-to-year percent changes for each of the nine travel segments discussed in this report. From 2004 to 2005, overnight and overnight leisure travel were the only segments to show a decline in Person-Stays, while all others increased.

	01/00	02/01	03/02	04/03	05/04
Total	2.7%	2.6%	0.9%	5.5%	2.6%
Business	-16.7%	6.1%	4.1%	-1.9%	2.3%
Leisure	9.3%	1.6%	0.1%	7.5%	2.7%
Day	24.3%	-1.4%	-2.6%	7.3%	6.5%
Night	-13.3%	6.8%	4.4%	3.7%	-1.1%
Night Business	-1.9%	0.2%	8.9%	0.7%	1.3%
Night Leisure	-16.5%	9.0%	3.1%	4.7%	-1.8%
Resident	N/A	-0.4%	2.4%	6.3%	0.2%
Non-Resident	N/A	6.4%	-0.8%	4.4%	5.7%

Utah Person-Stays Volume Intelligence



Utah's Person-Stays volume--or travelers--which takes into account the number of Stays and the number of persons in a travel party, increased 2.6% in 2005 to an all-time high of 31.2 million. Unlike flat Stays volume performance, the growth in 2005 is a result of increases in both the smaller business segment as well as the larger and continuously gaining leisure segment since 1997.

- Leisure Person-Stays increased 2.7% in 2005 to 24.9 million, reaching its all-time high in the past five years, while business Person-Stays increased 2.3% to 6.3 million, back to 2003 level.
- Overnight Person-Stays decreased 1.1% from 15.6 million to 15.4 million, while day trip Person-Stays increased 6.5% from 14.8 million to 15.8 million, reaching an all-time high and surpassing overnight for the first time since 1998. Thus, both overnight and day Person-Stays contributed to the total increase in travelers.

Note: Day-Trip Person-Stay volume numbers should be interpreted with caution due to low sample sizes.

- Overnight visitor volume in Utah is mainly comprised of Overnight leisure travelers (76%), representing 11.7 million Person-Stays to the State. Overnight leisure decreased 1.8% in 2005.
- Both non-resident and residents increased in terms of Person-Stays from 2004 to 2005, with non-resident travel up 5.7% from 13.5 million to 14.2 million and resident Person-Stays increasing slightly, up 0.2% to 17.0 million.

Overall, total Person-Stays increased at a faster rate than total Stays, indicating that there was a slight increase in the average party size (2.5%). The same was true for Utah's overnight leisure travel segment, even though both of their stays and person-stays volume was down.

Utah Person-Day Volume Trends



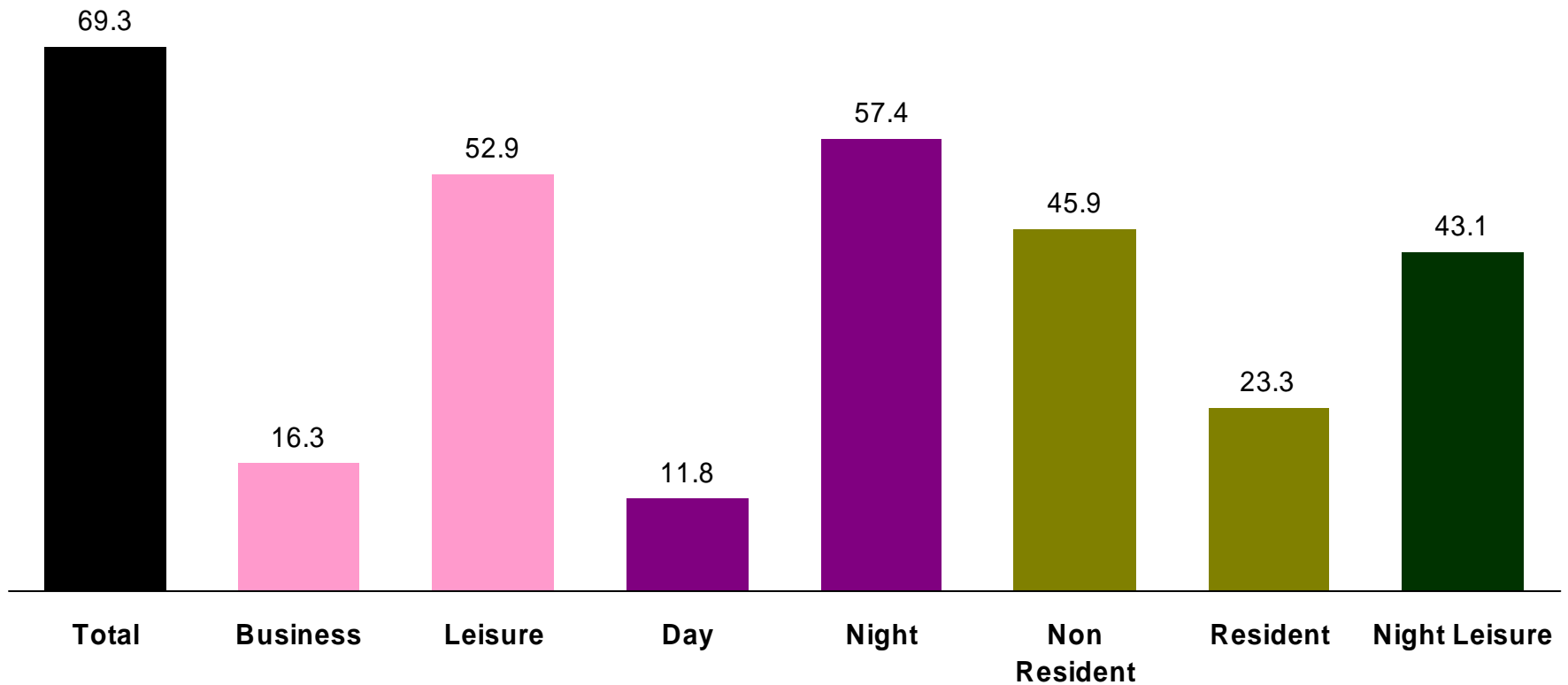
- The following section will detail the person-day volume trend in Utah over the last six years. Person-day volume measures the impact of a visitor to a market by including the length of stay and party size into the volume measure.

Mr. & Mrs. Smith's 5-day vacation in Anytown, USA = 10 person-days. (2 Person-Stays x 5 days)

Utah Person-Days Volume Summary (2005/Millions)



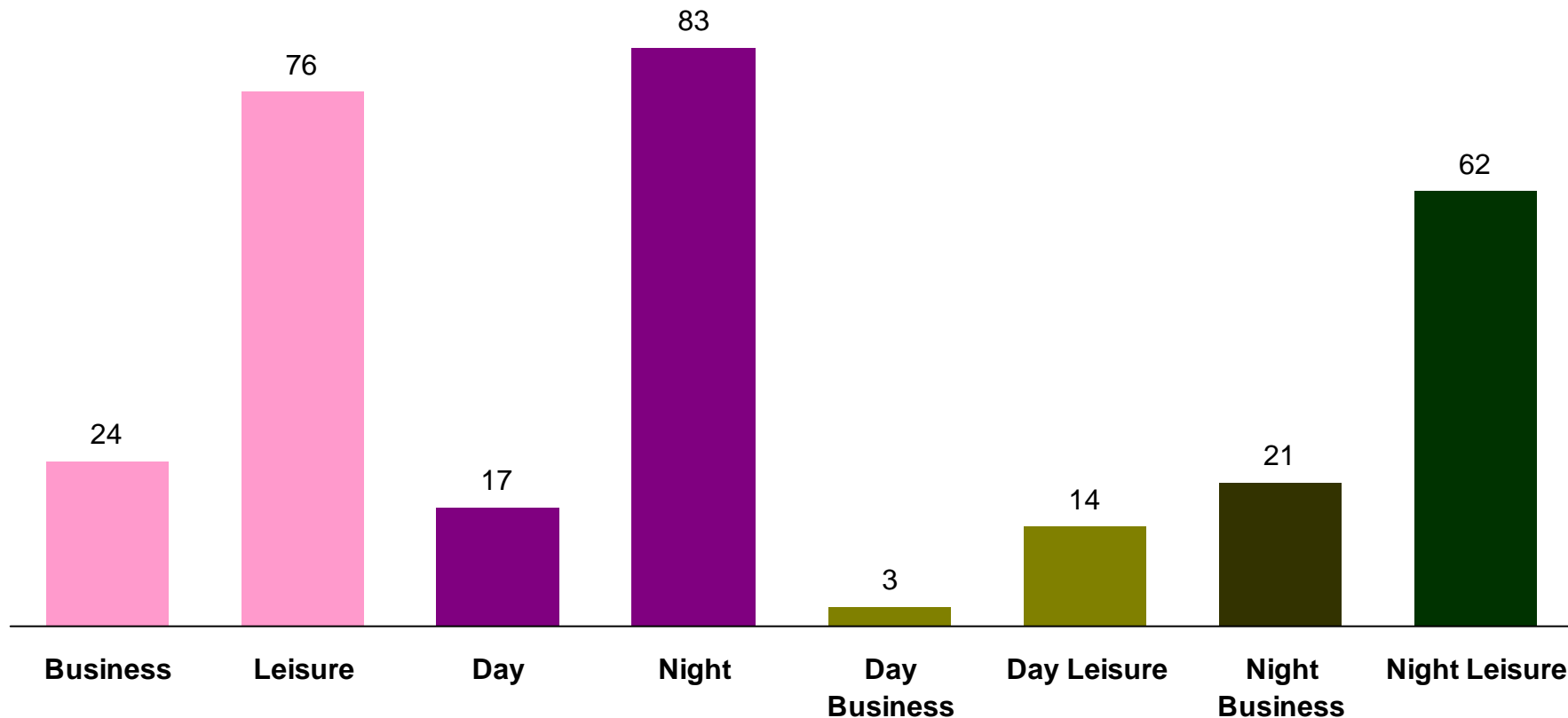
Utah hosted a total of 69.3 million Person-Days in 2005, the vast majority of which were leisure Person-Days (52.9 million).



Utah Person-Days Volume Summary (2005/% of Total Volume)



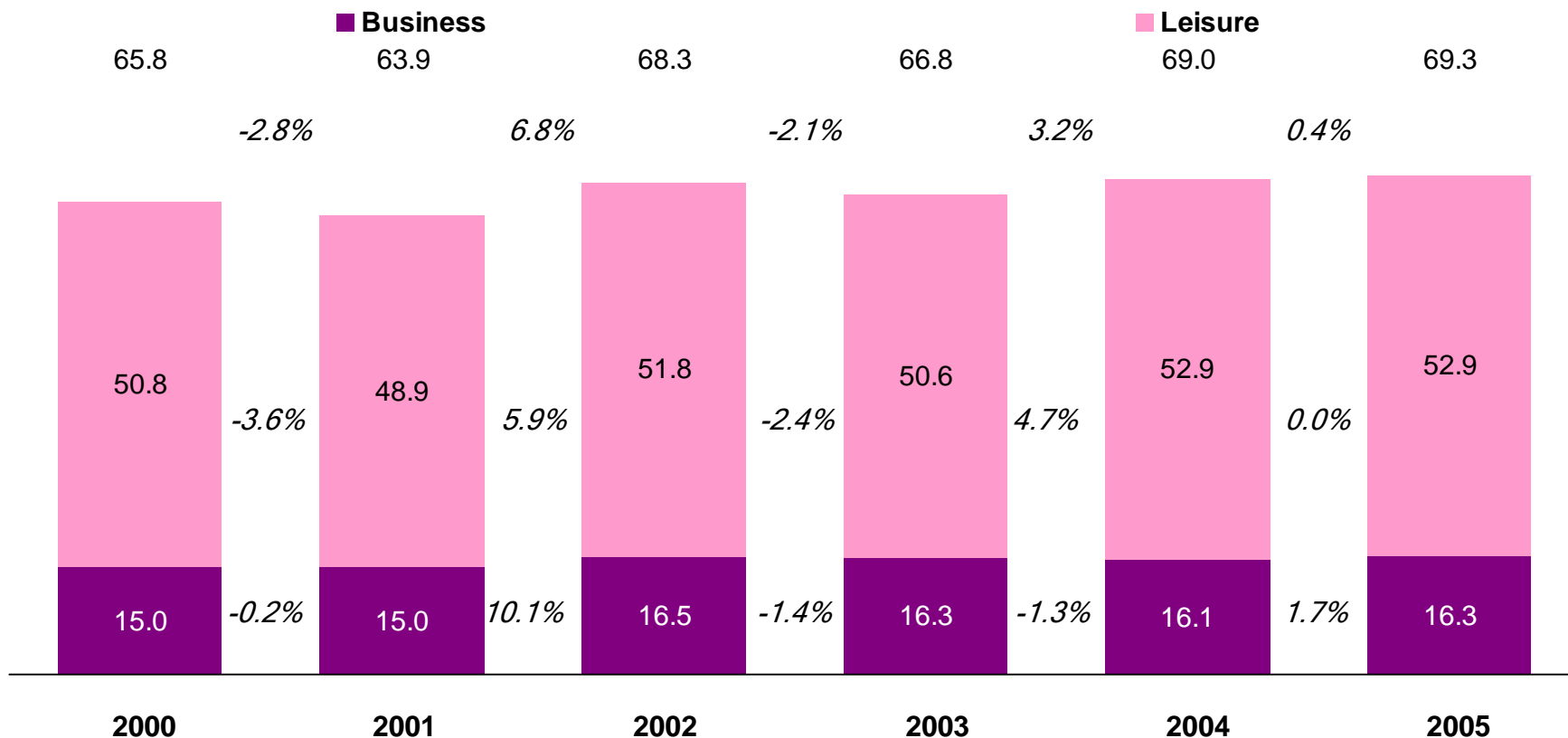
Utah's leisure travel segment comprised a remarkably higher share of Person-Days volume in 2005 than the business segment. However, unlike both Stays and Person-Stays, the distribution of Person-Days among day/overnight and resident/non-resident travel segments was more diverse, with overnight (83%) and non-resident (66%) representing the higher shares of Person-Days relative to their counterpart travel segments. Overnight leisure (62%) Person-Days represented almost two-thirds of total Person-Days in 2005.



Utah Person-Days Volume: Business vs. Leisure (2000-2005/millions)



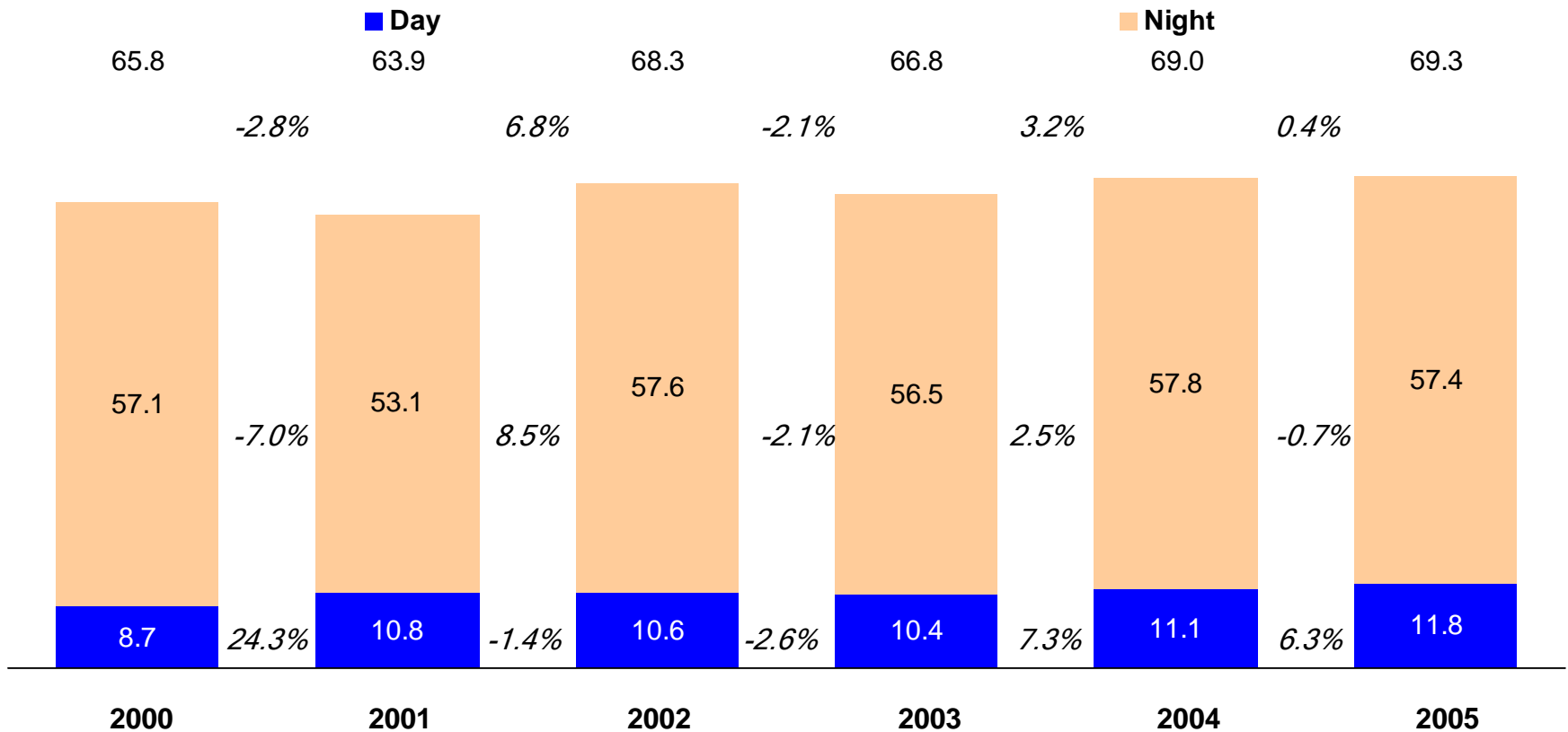
Utah Person-Day volume only increased slightly (0.4%) to 69.3 million from 2004 to 2005. This increase was driven solely by the 1.7% increase in business Person-Days volume since the leisure Person-Days volume remained almost unchanged from 2004 to 2005. Business Person-Days increased for the first year since 2003.



Utah Person-Days Volume: Day vs. Overnight (2000-2005/millions)



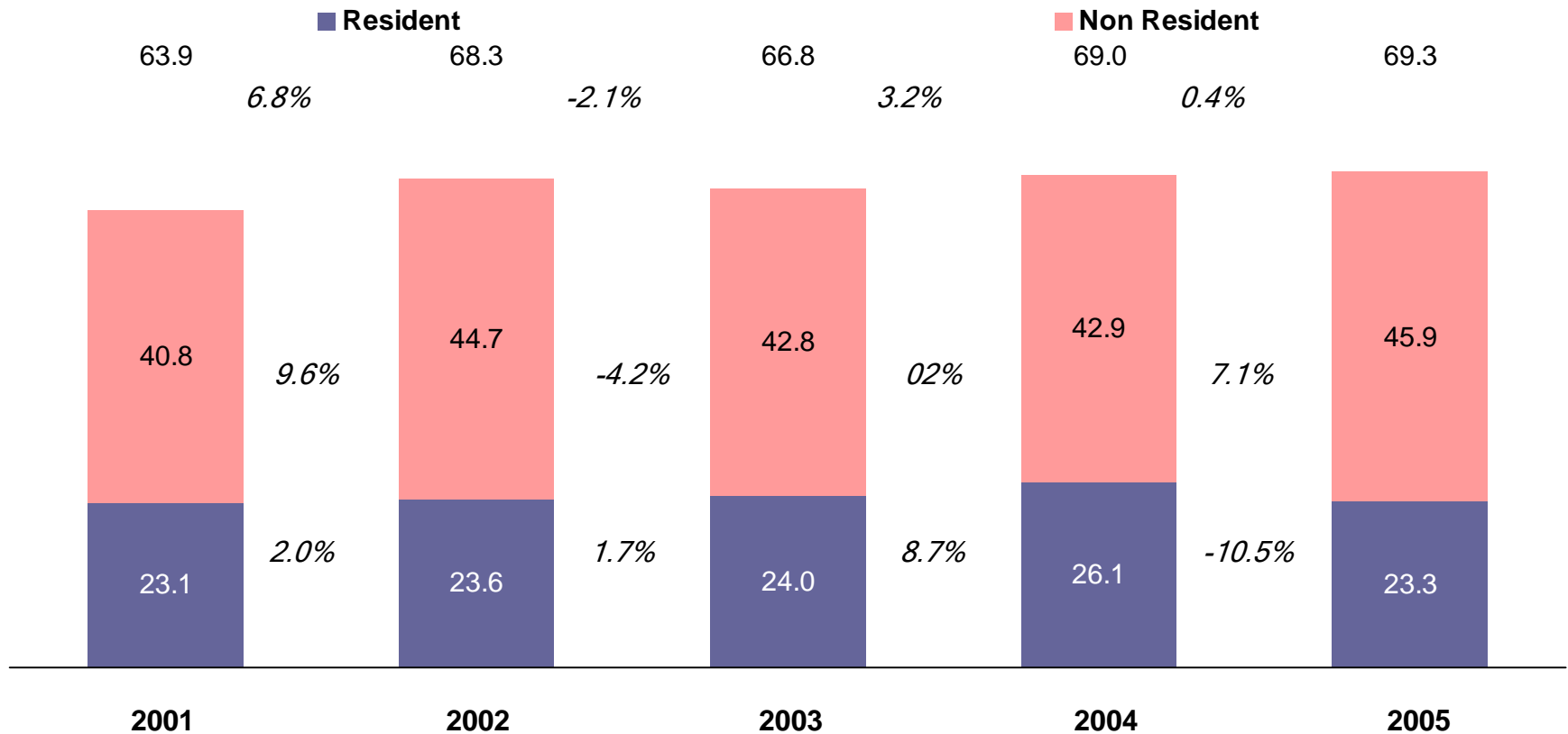
Overnight travel accounted for higher volumes than day travel in the Utah travel market from 2000 to 2005, even though overnight Person-Days volume declined slightly (0.7%) in 2005 over 2004. Utah day trip Person-Day volume rose 6.3% in 2005 over 2004.



Utah Person-Days Volume: Resident vs. Non-Resident (2001-2005/Millions)



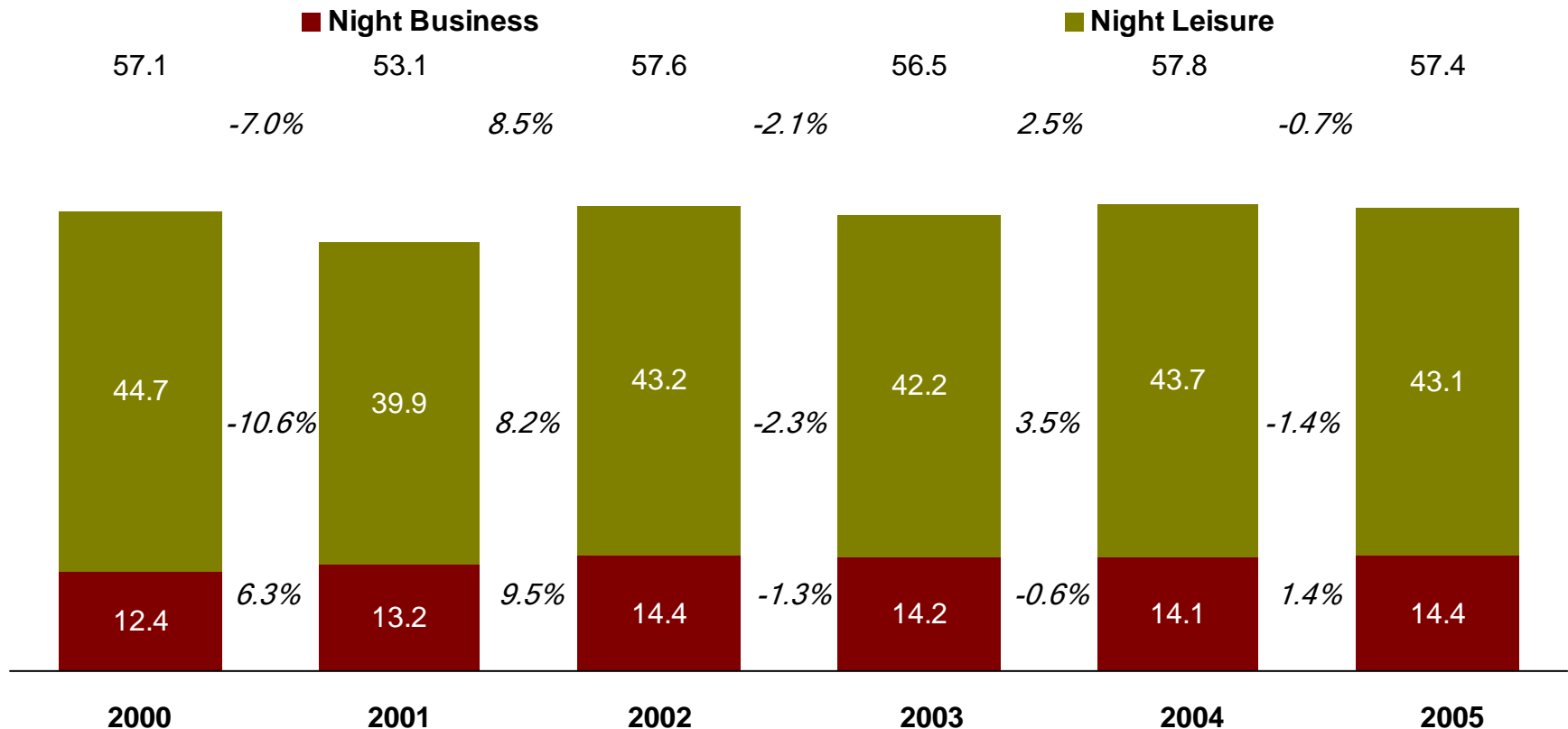
Resident Person-Days volume decreased 10.5%, while non-resident Person-Days volume increased 7.1% from 2004 to 2005. Resident Person-Days volume decreased for the first time since 2001 while non-resident Person-Days volume increased substantially from 2004 to 2005.



Utah Person-Days Volume: Day Leisure vs. Overnight Leisure (2000-2005/millions)



Overnight leisure accounts for higher volumes than overnight business in the Utah travel market from 2000 to 2005, even though overnight leisure Person-Days volume decreased 1.4% in 2005. The 2005 decrease in total overnight Person-Days was driven exclusively by the decrease in overnight leisure Person-Days. Overnight business Person-Days increased slightly. Over the past six years, overnight leisure Person-Days have increased only in 2002 and again in 2004, with declines in all other years.



Utah Person-Days Volume: % Change by Travel Segment (2000-2005)



This chart shows the person-days year-to-year percent changes for each of the nine travel segments discussed in this report. From 2004 to 2005, the night, night leisure and resident travel segments were the only segments to experience a decline in Person-Day travel. The changes across the travel segments from 2004 to 2005 was more positive than from 2002 to 2003, during which time all segments except Resident decreased in Person-Day volume.

	01/00	02/01	03/02	04/03	05/04
Total	-2.8%	6.8%	-2.1%	3.2%	0.4%
Business	-0.2%	10.1%	-1.4%	-1.3%	1.7%
Leisure	-3.6%	5.9%	-2.4%	4.7%	0.0%
Day	24.3%	-1.4%	-2.6%	7.3%	6.3%
Night	-7.0%	8.5%	-2.1%	2.5%	-0.7%
Night Business	6.3%	9.5%	-1.3%	-0.6%	1.4%
Night Leisure	-10.6%	8.2%	-2.3%	3.5%	-1.4%
Resident	N/A	2.0%	1.7%	8.7%	-10.5%
Non-Resident	N/A	9.6%	-4.2%	0.2%	7.1%

Utah Person-Days Volume Intelligence



The Utah Person-Days volume, which takes into account Stays, Party Size and Stay Length, increased slightly (0.4%) from 69.0 million in 2004 to 69.3 million in 2005, again reaching an all-time high. It was Utah's much smaller business travel segment that drove the increase in visitor days.

- Leisure Person-Days remained at the same level as 2004 (52.9 million), while business Person-Days increased 1.7% from 16.1 to 16.3 million from 2004 to 2005, bouncing back from the decreases in the last two years.
- Overnight Person-Days decreased slightly (0.7%) from 57.8 million to 57.4 million, while day trip Person-Days increased 6.3% from 11.1 million in 2004 to 11.8 million in 2005. Thus, the smaller day trip segment increase contributed to the total increase.
- Non-residents Person-Days volume increased 7.1% from 42.9 million to 45.9 million in 2005. Resident Person-Days volume experienced a double-digit decline (down 10.9%) from 26.1 million to 23.3 million Person-Days from 2004 to 2005.
- Overnight leisure Person-Days decreased 1.4% to 43.1 million, while overnight business Person-Days increased 1.4% to 14.4 million from 2004 to 2005, softening up the overall 0.7% decline in the overnight segment. Overnight leisure travel, accounting for 75% of total overnight Person-Day volume, has been fluctuating over the past five years.

Overall Person-Day volume increased at a slower rate (0.4%) than total Person-Stays volume (2.6%) in 2005, because the average stay length declined.

Utah Direct Spending Trends

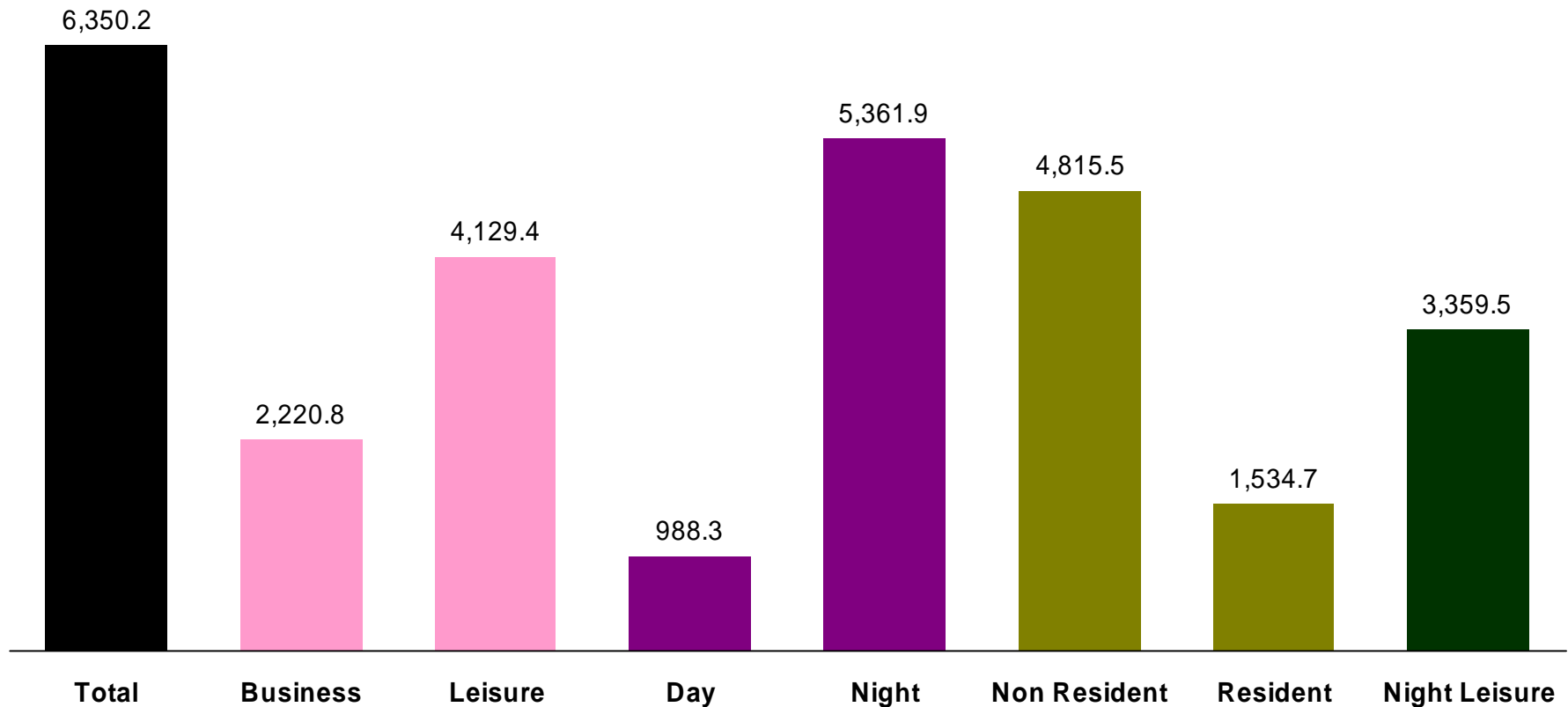


- The following section will detail the direct spending volume trend in Utah over the last six years. Direct spending volume measures the total traveler spending in a market. The direct spending measure tracks total traveler spending on transportation, room, food, Entertainment, shopping, and other miscellaneous travel costs. Direct spending does not measure the indirect or induced economic impact driven by traveler spending. (The indirect and induced spending estimates can be purchased separately in the *PERFORMANCE/Monitor*SM *ECONOMIC IMPACT* report).

Utah Direct Spending Summary (2005/\$Millions)



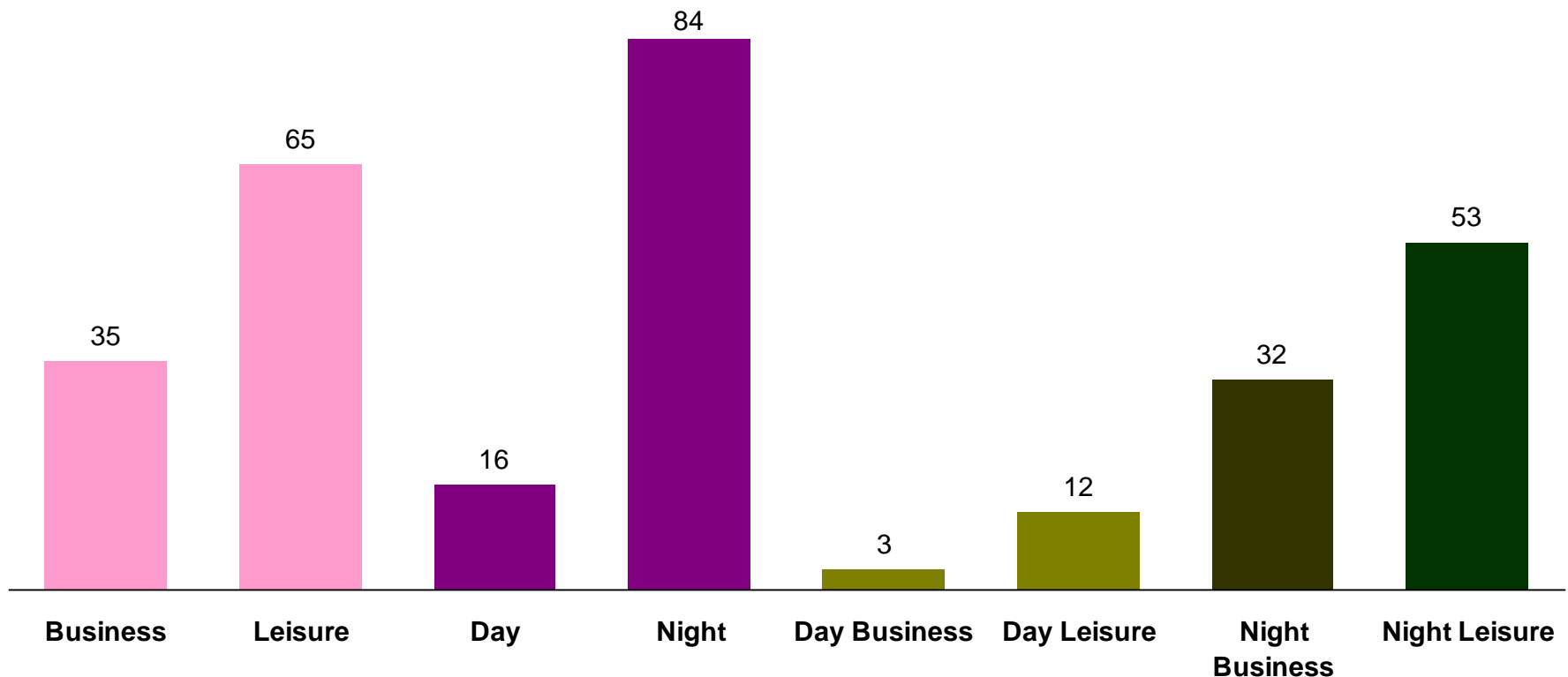
This chart summarizes Utah traveler spending for each of the travel segments discussed in this report. Direct spending (no indirect or induced spending impacts included) includes spending by travelers on transportation, accommodations, food and beverage, shopping, Entertainment, and other miscellaneous purchases. Utah visitors contributed \$6,350.2 million to the state in 2005. Overnight business direct spending, not represented in this graph, totaled 2,002.4 million in 2005.



Utah Direct Spending Summary (2005/% of Total Spending)



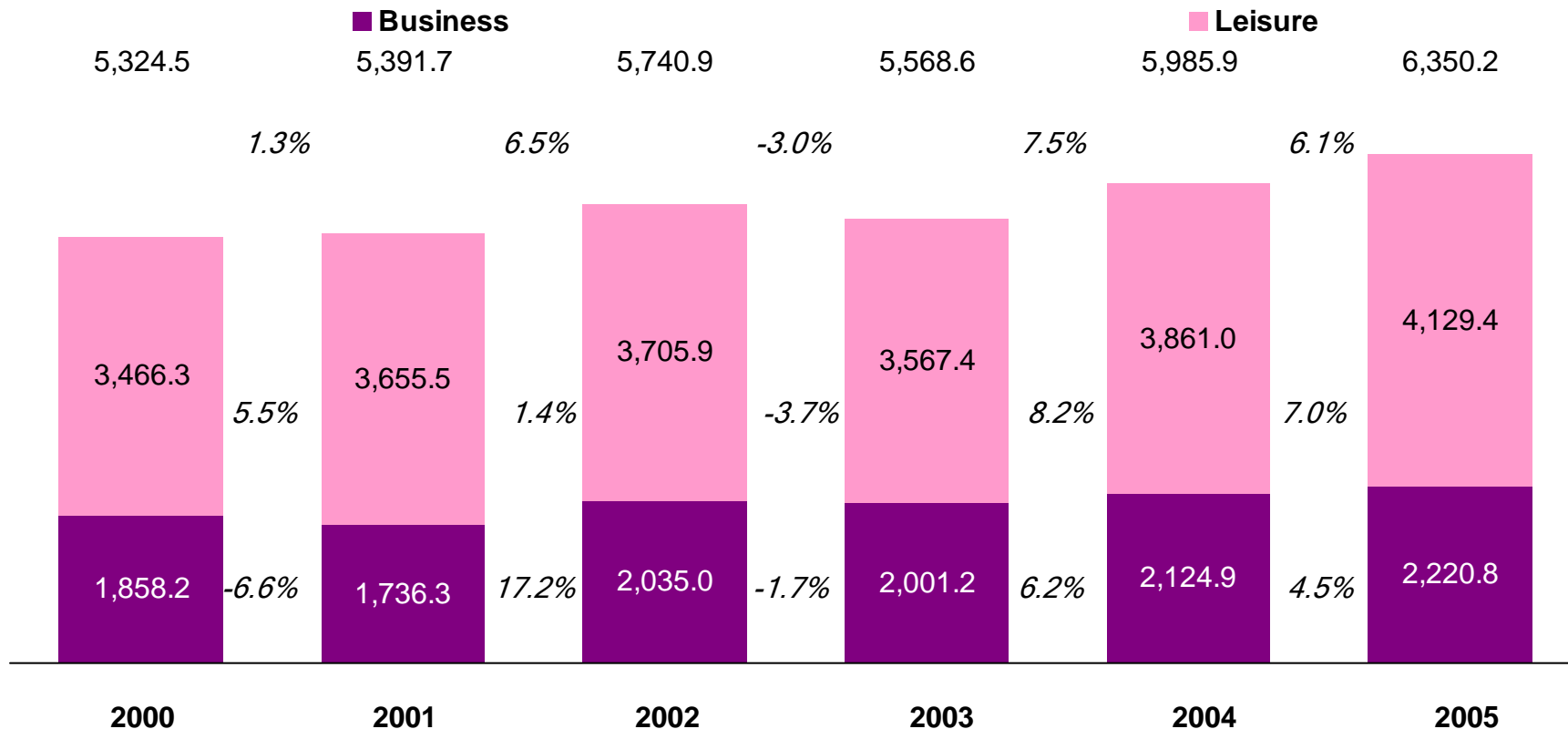
This charts shows the proportion of total Utah travel spending by different travel segments. Overnight visitors contributed the highest share (84%) of total Direct Spending among all Utah travel segments. Of total overnight spending, overnight leisure (53%) had higher share than overnight business (32%). There was a tremendous difference in share of direct spending between day (16%), compared to overnight (84%) and resident (76%) compared to non-resident (24%) travelers, with the non-residents and overnight travelers providing the highest proportions of dollars.



Utah Direct Spending: Business vs. Leisure (2000-2005/\$Millions)



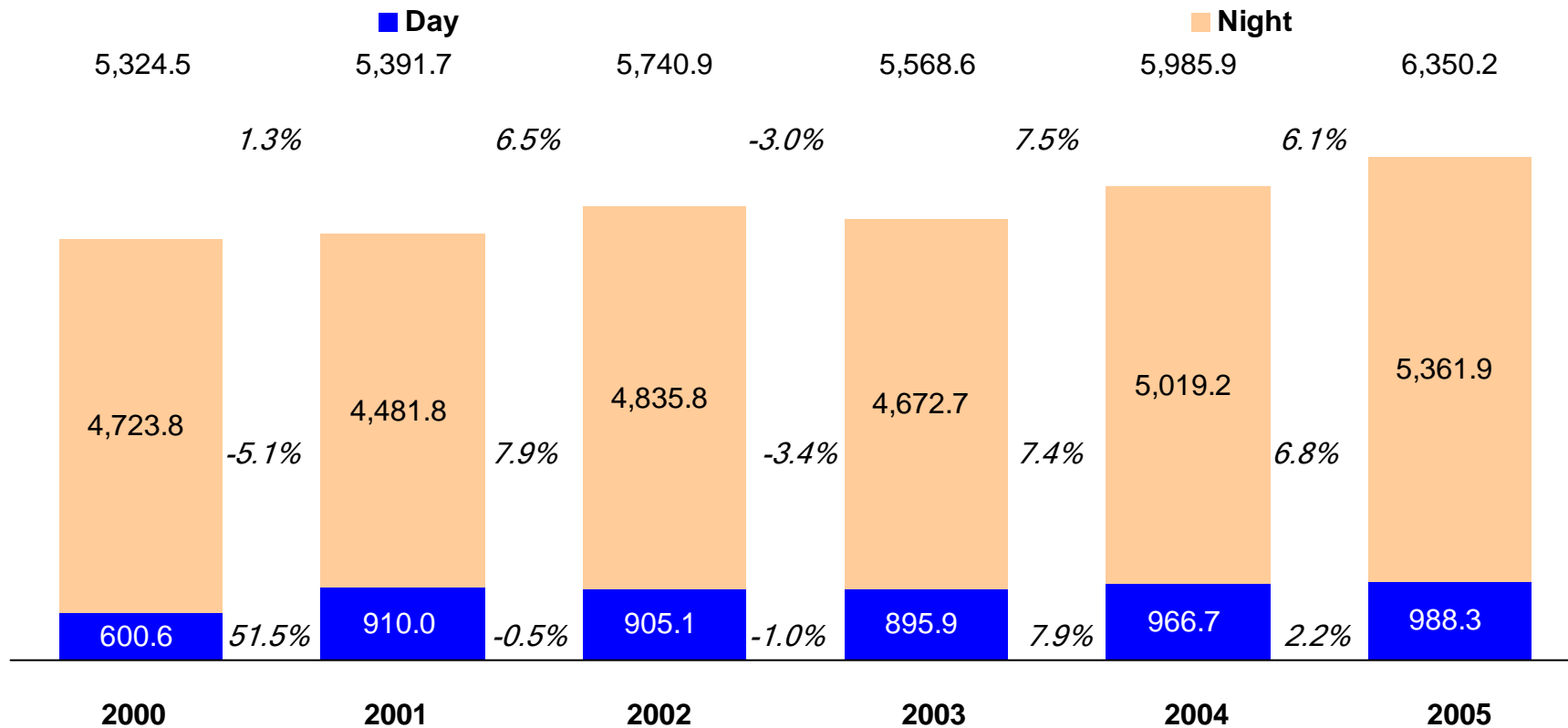
Utah total Direct Spending increased 6.1% in 2005 over 2004. This growth was fueled by increases in both business and leisure spending, which grew 4.5% and 7.0%, respectively. Leisure traveler direct spending increased in each year except 2003, while business traveler direct spending fluctuated during the past six years.



Utah Direct Spending: Day vs. Overnight (2000-2005/\$Millions)



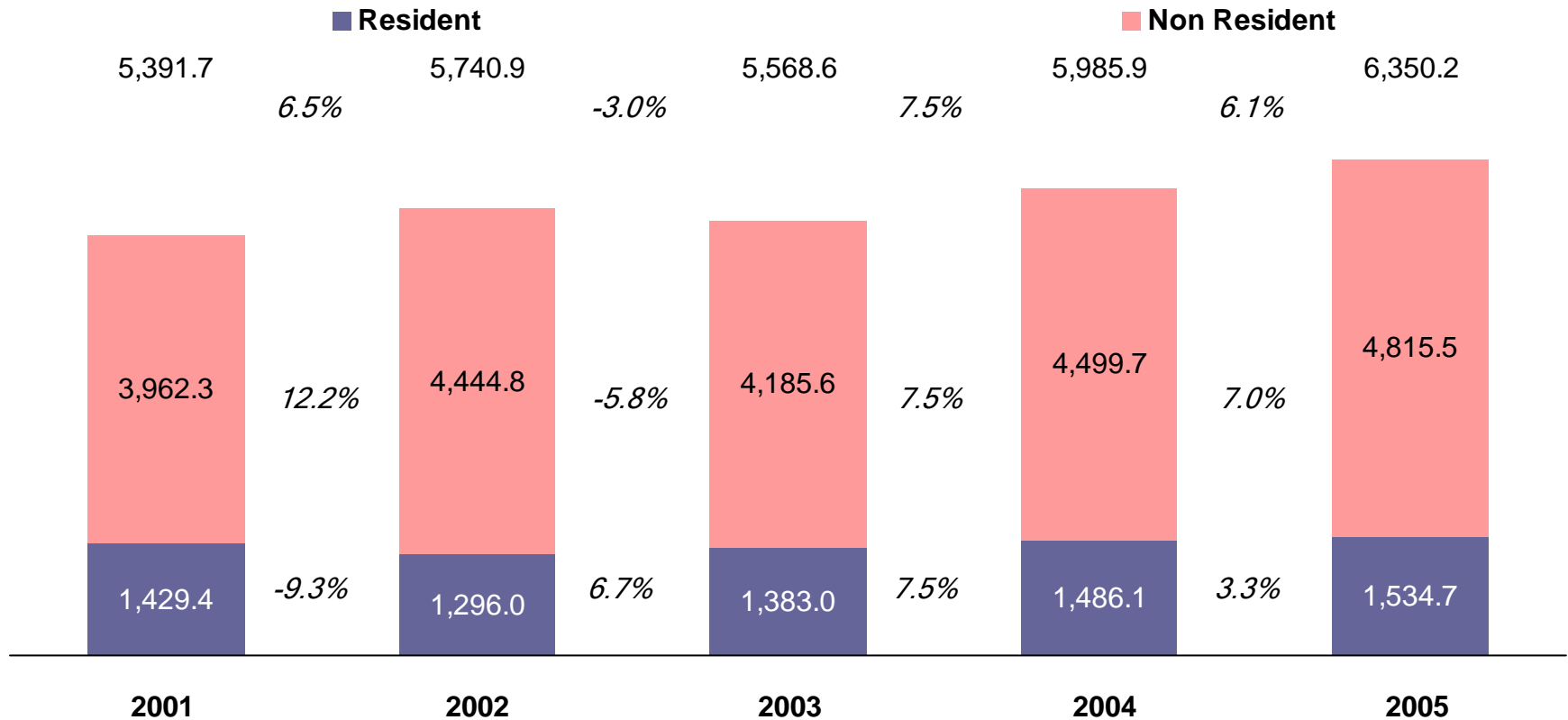
Utah Overnight Direct Spending increased 6.8% from 2004 to 2005. This is a continuous upward trend since 2003. The day Direct Spending increased 2.2% in 2005. After a more than 50% increase in 2001, day trip traveler direct spending levels have been relatively steady, with only slight declines in 2002, 2003 and increases in the past two years.



Utah Direct Spending: Resident vs. Non-Resident (2001-2005/\$Millions)



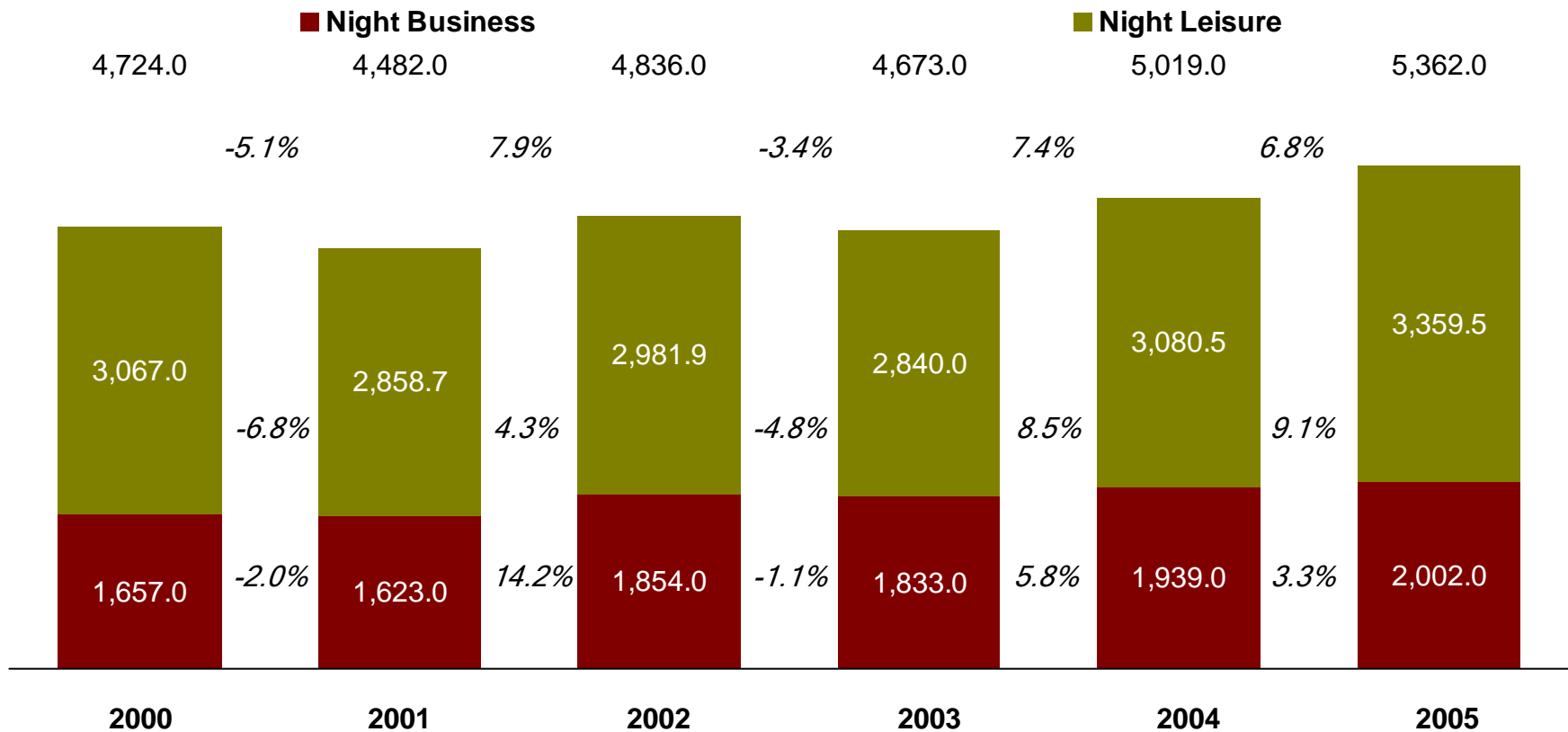
Utah resident and non resident traveler spending levels both increased from 2004 to 2005, 3.3% and 7.0%, respectively. The increase in resident travel spending in 2005 marked the fourth year in a row of spending increase in this segment. The non-resident spending levels declined in 2003, but increased in 2004 and 2005.



Utah Direct Spending: Day Leisure vs. Overnight Leisure (2000-2005/\$Millions)



The rise in overnight traveler direct spending from 2004 to 2005 was driven by increases in spending among both overnight leisure (9.1%) and overnight business (3.3%) travelers. Spending contribution in the overnight leisure and overnight business segments has fluctuated over the past six years, driven by a variety of travel market influences.



Utah Traveler Direct Spending: % Change by Travel Segment (2000-2005)



This chart shows the year-to-year percent changes for each of the nine travel segments discussed in this report. Utah traveler direct spending levels increased in each travel segment from 2004 to 2005. The changes across the travel segments from 2004 to 2005 was more positive than from 2003 to 2002, during which all segments except resident decreased in Direct Spending volume.

	01/00	02/01	03/02	04/03	05/04
Total	1.3%	6.5%	-3.0%	7.5%	6.1%
Business	-6.6%	17.2%	-1.7%	6.2%	4.5%
Leisure	5.5%	1.4%	-3.7%	8.2%	7.0%
Day	51.5%	-0.5%	-1.0%	7.9%	2.2%
Night	-5.1%	7.9%	-3.4%	7.4%	6.8%
Night Business	-2.0%	14.2%	-1.1%	5.8%	3.3%
Night Leisure	-6.8%	4.3%	-4.8%	8.5%	9.1%
Resident	N/A	-9.3%	6.7%	7.5%	3.3%
Non-Resident	N/A	12.2%	-5.8%	7.5%	7.0%

Utah Traveler Direct Spending Intelligence



Spending by Utah visitors increased in all travel segments to all-time records, producing an overall 6.1% increase in total travel dollars from \$5,986 million in 2004 to \$6,305 million in 2005.

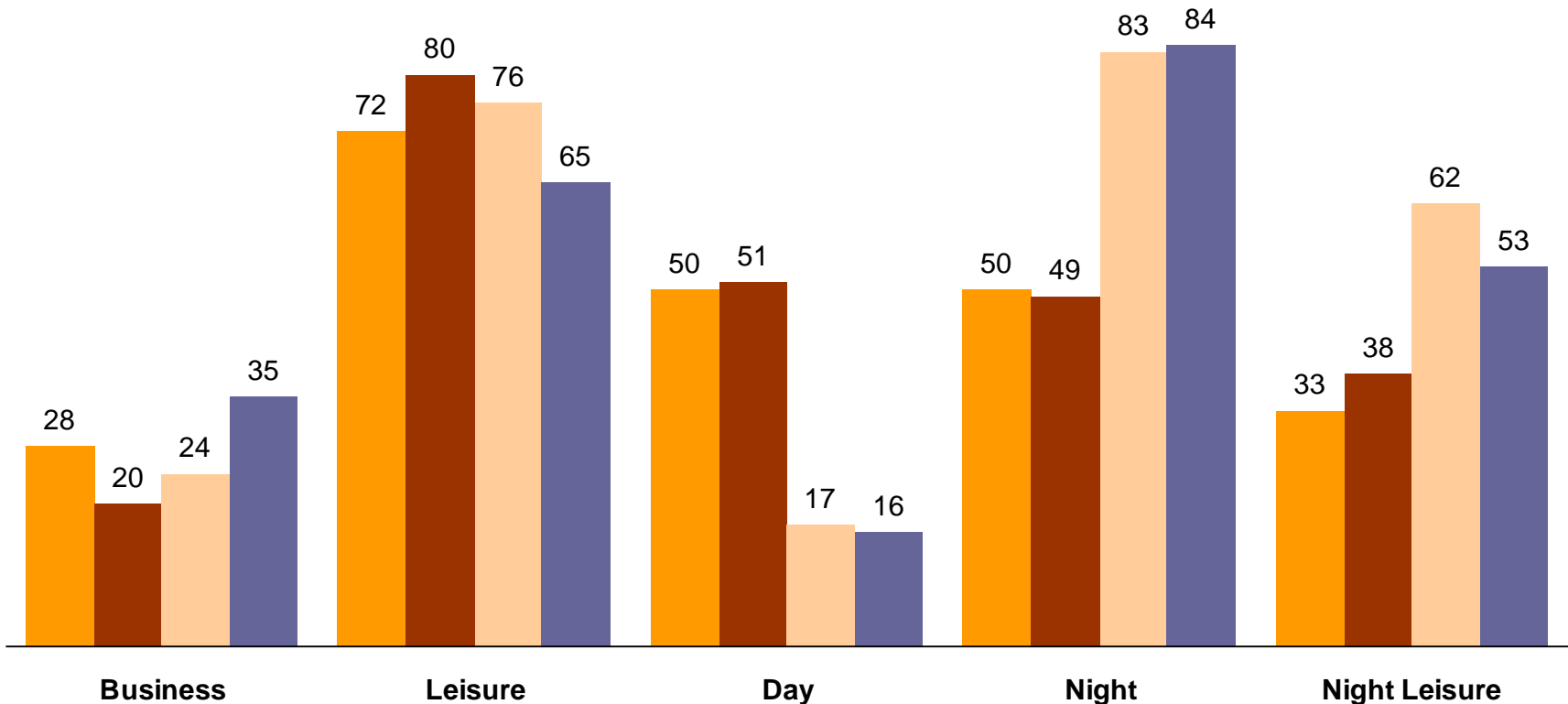
- Utah Leisure visitor Direct Spending increased 7.0% from \$3,861 million to \$4,129 million while Business visitor Direct Spending increased 4.5% from \$2,125 million to \$2,221 million.
- Among total overnight visitors, Direct Spending levels increased 6.8% from \$5,019 million to \$5,362 million, contributing a hefty 84% of the total direct spending in 2005. Day trip travelers spent \$988 million in Utah in 2005, up 2.2% from \$967 million in 2004.
- Non-resident visitor Direct Sending increased 7.0% from \$4,500 million to \$4,816 million, while resident visitor Direct Spending increased 3.3% from \$1,486 million to \$1,535 million in 2005 over 2004. Non-resident visitor direct spending consolidated at a 76% share of total direct spending for the past three years.
- Overnight leisure visitor Direct Spending increased 9.1% to \$3,359 million and overnight business traveler direct spending increased 3.3% to \$2,002 million from 2004 to 2005.

Utah Travel Segments (2005/% of Total Volume)



This chart summarizes each travel segment's proportion of Utah's visitors for each of the four travel volume measures provided in this report: Stays, Person-Stays, Person-Days, and Direct Spending. The leisure segment contributed the most travel when measured in Stays (72%) and Person-Stays (80%), while the overnight segment had slightly higher shares compared to other segments when measured by Person-Stays (83%) and Direct Spending (84%). Day segment had the lowest shares when measured in Person-Days (17%) and Direct Spending (16%).

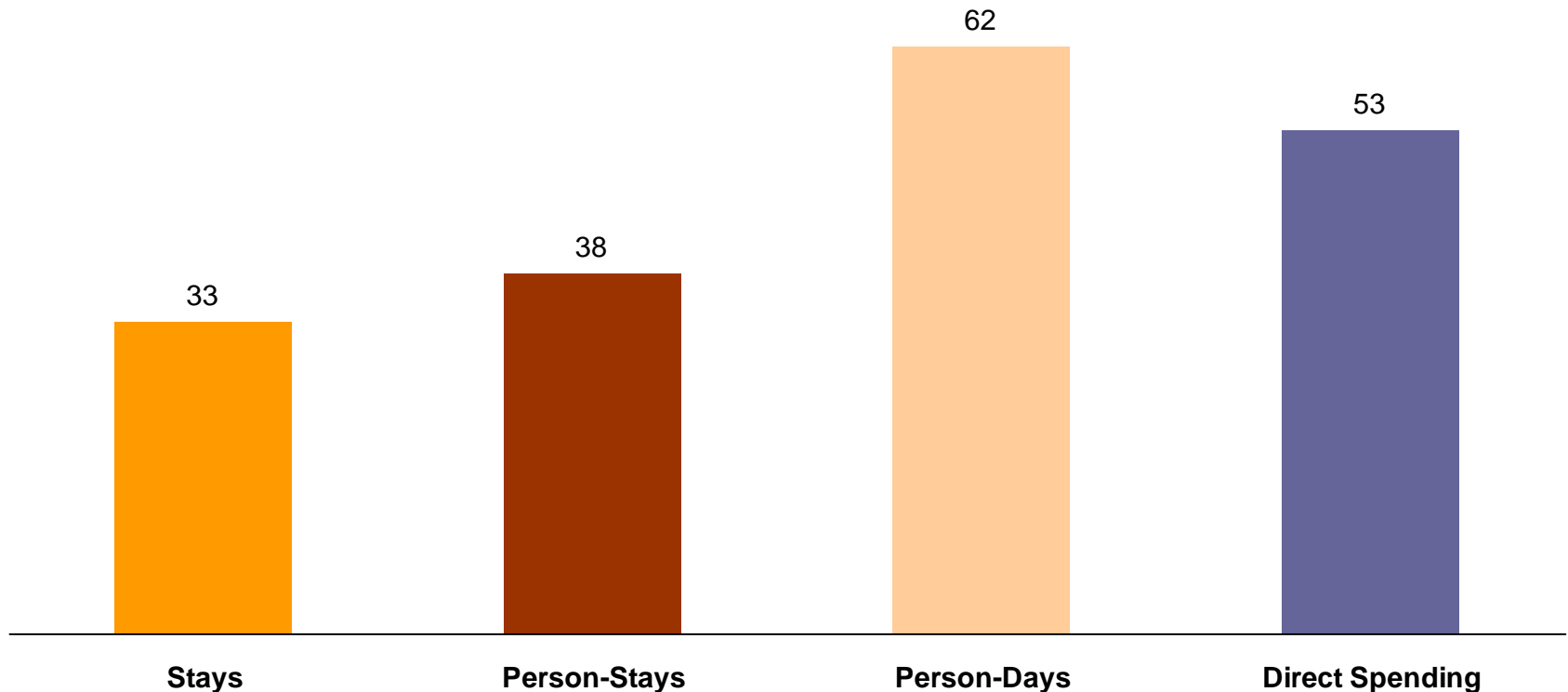
■ Stays ■ Person-Stays ■ Person-Days ■ Direct Spending



Utah Overnight Leisure Volume Summary (2005/% of Total Volume)



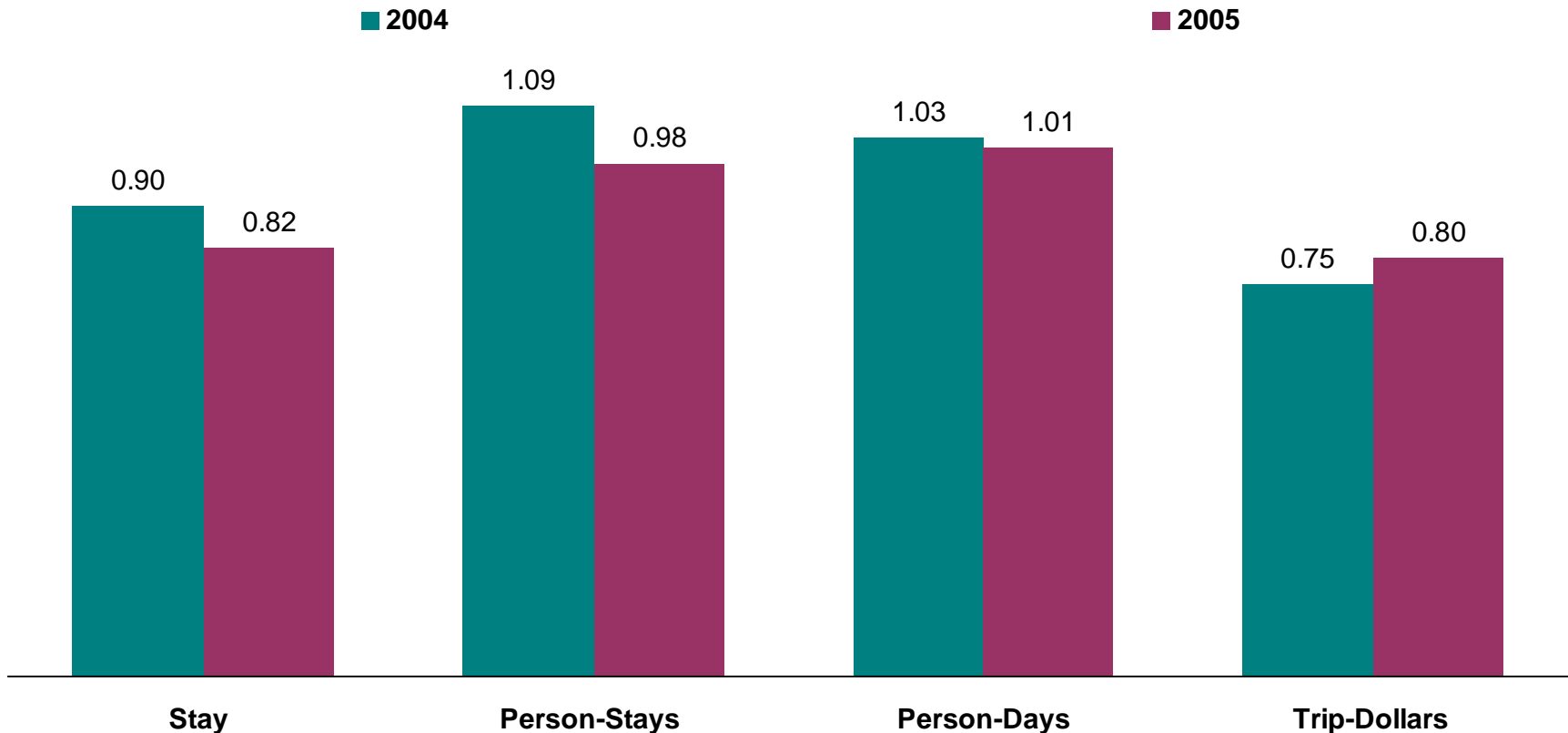
This profile focuses on the overnight leisure travel segment. Overnight leisure volume accounts for 33% of travel party volume but contributes 53% of trip-dollar spending volume. Overnight leisure person-days volume represents the highest share of the total volume (62%). Compared to the U.S. (on slide 40), Utah attracts the similar share of overnight leisure measured in travel parties, visitor, and person-days volume, and obtains considerably fewer direct spending dollars in 2005.



Utah Share of U.S. Travel (2004 vs. 2005/% of Overnight Leisure)



Utah's share of U.S. overnight leisure travel in 2005 continued the downward trend from 2003 across all travel measures except in trip-dollars measures.





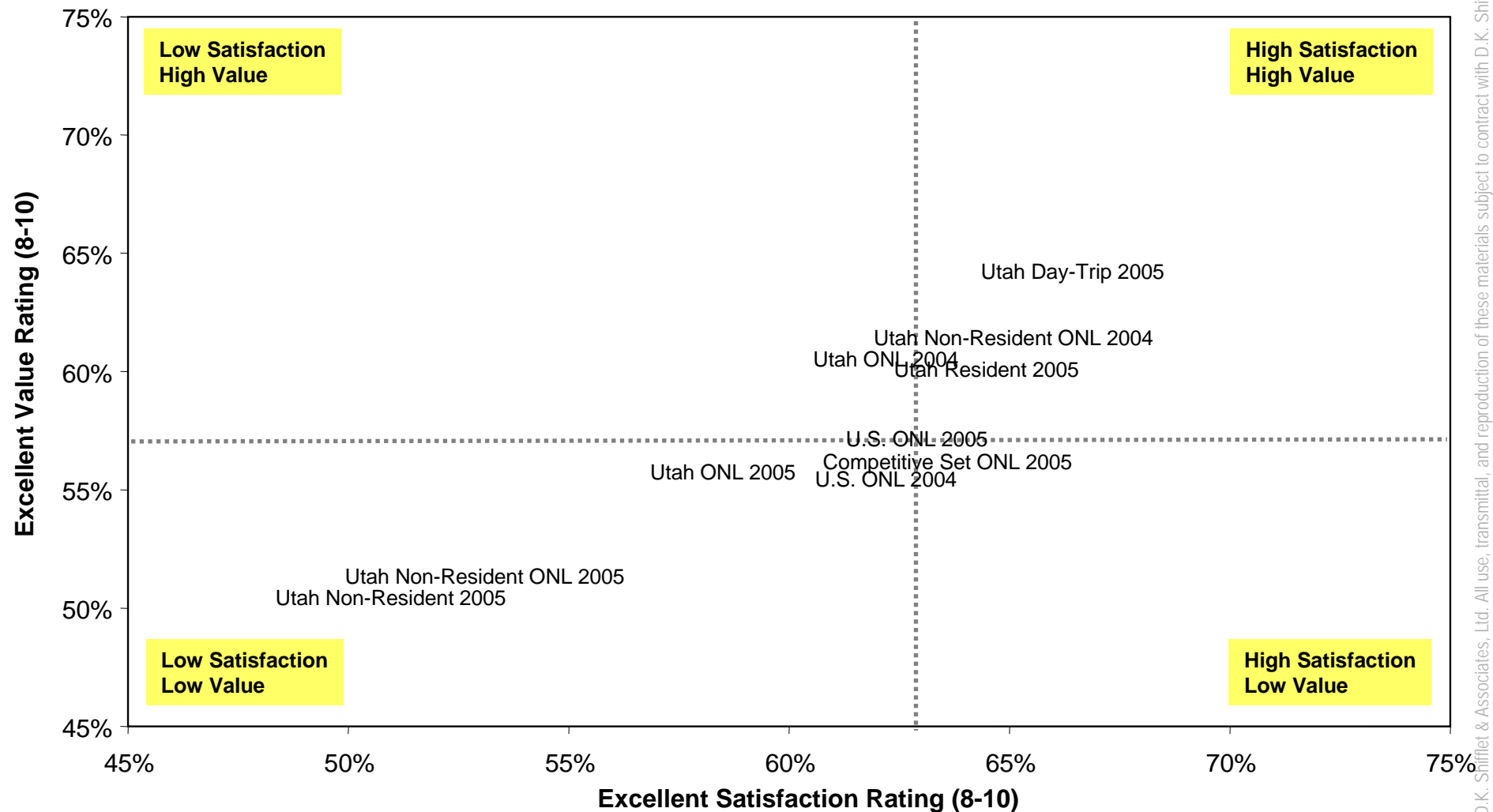
Utah's overnight leisure travel segment, the focus of the profile report, contributed 33% of Stays, 38% of Visitors or Person-Stays, 62% of Person-Days and 53% of total Direct Spending.

From 2004 to 2005, Utah experienced decreases in share of U.S. overnight leisure Stays (from 0.90% to 0.82%), Person-Stays (from 1.09% to 0.98%), Person-Days (from 1.03% to 1.01%), but increased in share of U.S. overnight leisure Direct Spending (from 0.75% to 0.8%).



- In DKSA's *PERFORMANCE/Monitor*SM, respondents are asked to rate their stays on the destination overall satisfaction and overall value-for-the-money on a 10-point scale, where 1 is lowest or "poor" and 10 is highest or "excellent".
- The following chart shows the destination and each of its travel segments' satisfaction and value ratings. The chart plots the percentage of top three (net) ratings which are considered "high" ratings.
- The matrix shows the location of each region in relation to the four combinations of low or high satisfaction, and low or high value. The four combinations create quadrants using the nationwide averages for high satisfaction and high value ratings.
- While the nationwide and Utah's overnight leisure averages are similar in 2005 and remained stable over 2004, Utah's overall satisfaction ratings fell slightly from 62% of overnight leisure travelers rating the destination excellent in 2004 to 58% in 2005. In addition, the excellent satisfaction for Utah was rated about five percentage points less than the U.S. average destination in 2005. Value ratings dropped also about five percentage points for Utah overnight leisure from 2004 to 2005.
- The chart clearly shows Utah's overnight leisure residents' influence on the excellent satisfaction and value ratings in 2005. While Utah's satisfaction dropped five percentage points in excellent ratings among overnight leisure travelers, it decreased ten percentage points among non-resident overnight leisure visitors from 2004 to 2005. That leads to the conclusion that overnight leisure residents' higher excellent ratings softened the decline in both measures.
- Travelers coming to Utah for day trips in 2004 and 2005 gave the State its highest excellent value and satisfaction ratings, 63% and 66%, respectively.

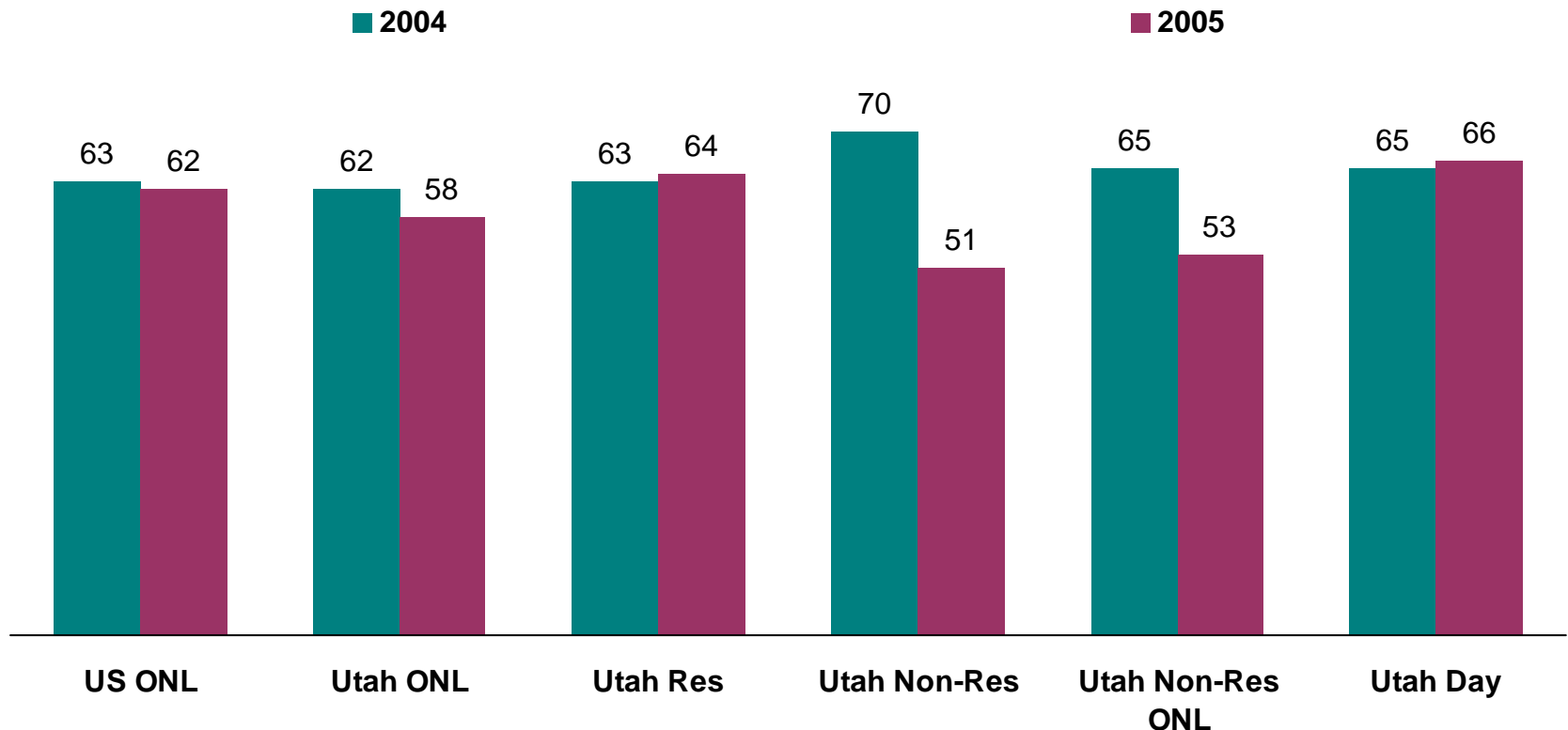
Destination Satisfaction vs. Value Ratings: U.S., Comp Set, and Utah's Travel Segments (2004 vs. 2005/ Person-Stays)



Excellent Destination Satisfaction Ratings by Travel Segment: U.S. and Utah's Travel Segments (2004 vs. 2005/%8-10 on 10 point scale of Person-Days)



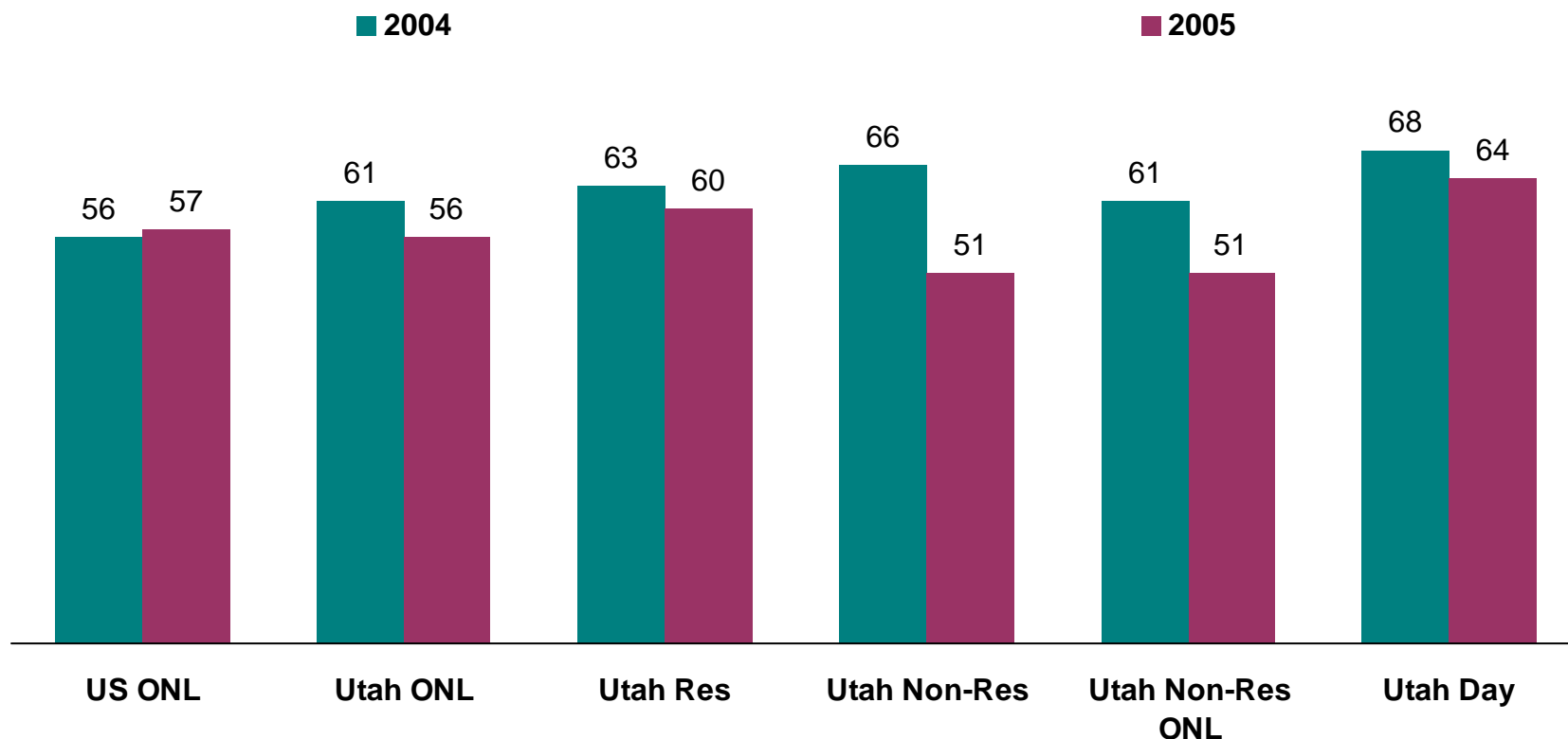
Although more than half of Utah's overnight leisure visitors (58%) rated the destination as a whole "Excellent" for satisfaction, the rating was four percentage points lower than it was in 2004. Utah non-resident overnight leisure visitors gave the second lowest satisfaction rating (53%) to the State in 2005, down 12 percentage points from 2004.



Excellent Destination Value Ratings by Travel Segment: U.S. and Utah's Travel Segments (2004 vs. 2005/%8-10 on 10 point scale of Person-Days)



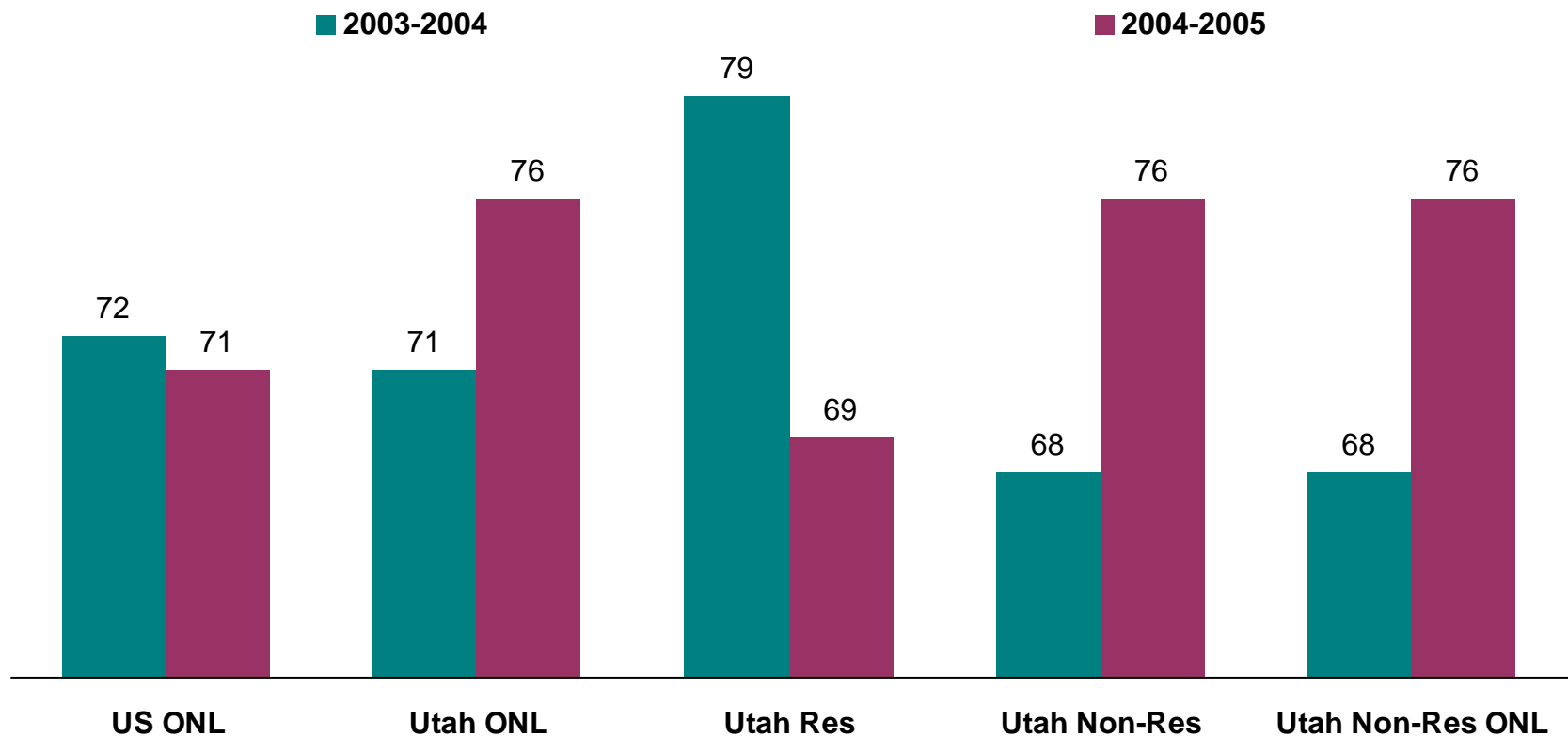
Destination value rating also declined for Utah overnight leisure visitors, from 61% in 2004 to 56% in 2005. Driving factor behind the decline in Utah overnight leisure value rating was the huge decrease in value rating by Utah's non-resident overnight leisure visitors, down from 61% in 2004 to 51% in 2005.



Excellent Hotel Satisfaction Ratings by Travel Segment: U.S. and Utah's Travel Segments (2003-2004 vs. 2004-2005/%8-10 on 10 point scale of Person-Days)



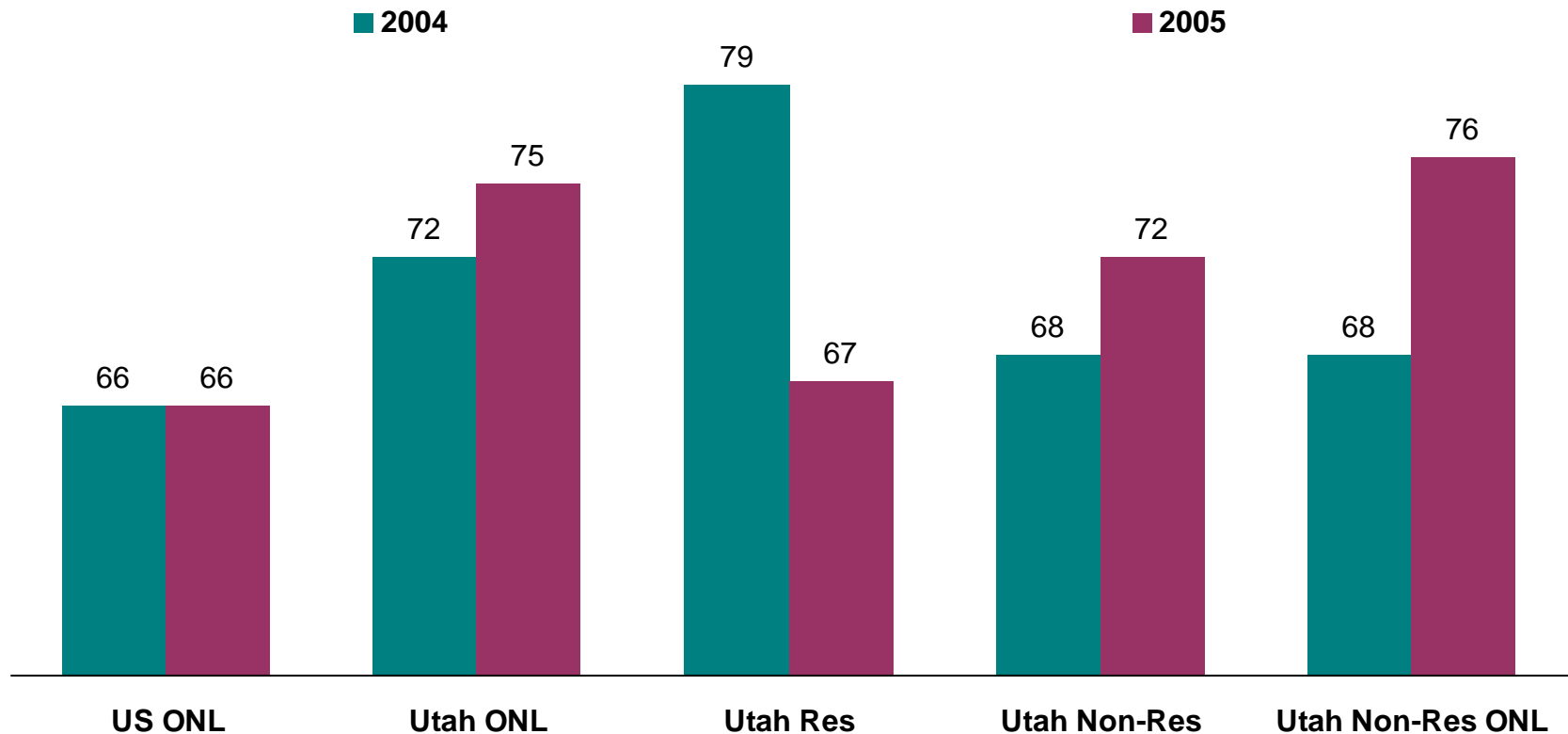
A much higher share of Utah overnight leisure visitors rated the Hotel accommodation “Excellent” in terms of satisfaction than they did for the destination satisfaction rating as a whole, 76% (2004/2005) vs. 58% (2005), respectively. Utah received highest hotel satisfaction ratings in both time periods from the overnight leisure visitors when comparing to the competing destinations.



Excellent Hotel Value Ratings by Travel Segment: U.S. and Utah's Travel Segments (2003-2004 vs. 2004-2005 / %8-10 on 10 point scale of Person-Days)



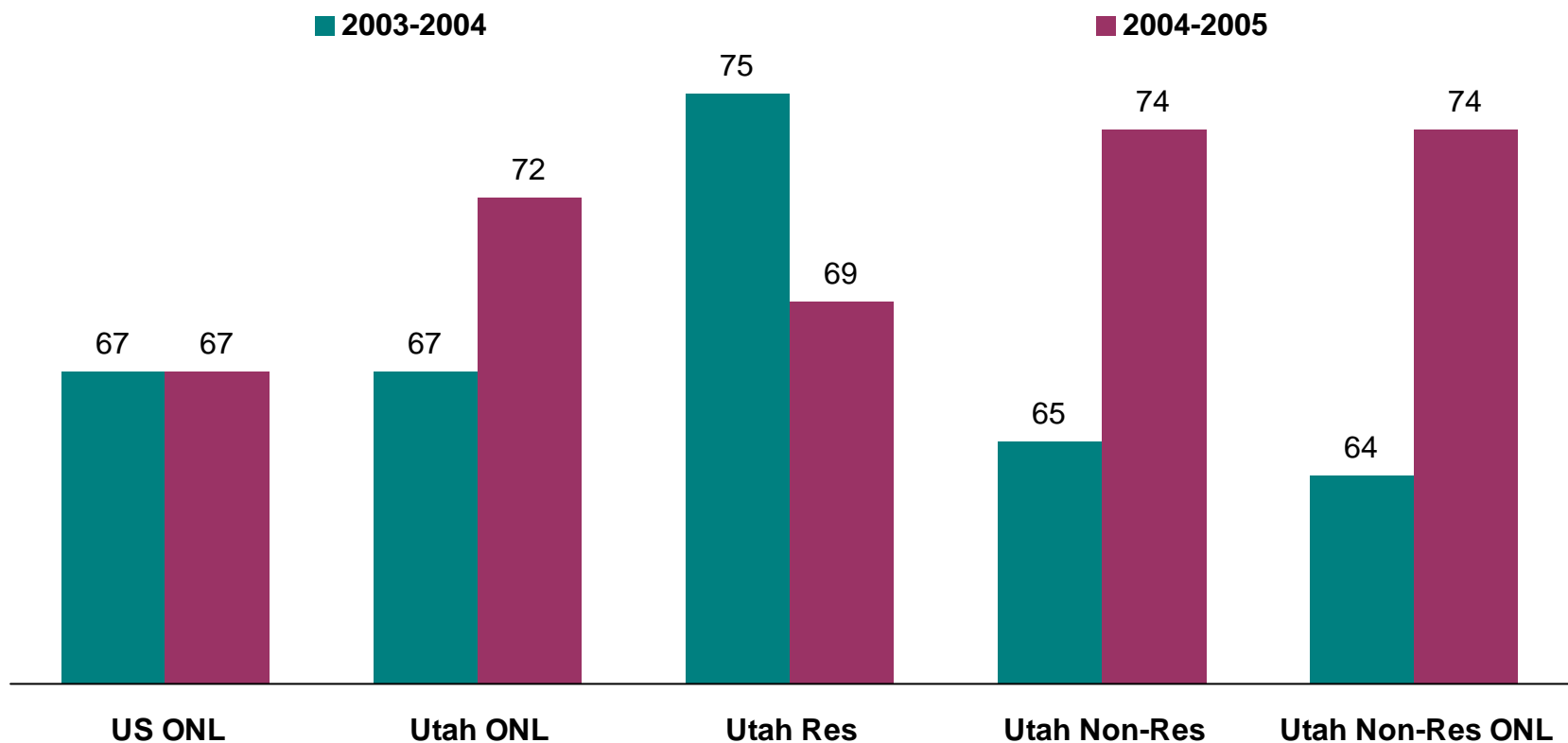
Utah overnight leisure visitors also provided higher hotel value ratings than they rated the value of destination as a whole, 75% (2004/2005) vs. 56% (2005), respectively. Hotel value ratings increased for Utah overnight leisure visitors from 2003-2004 time period to 2004-2005 time period.



Excellent Hotel Service Ratings by Travel Segment: U.S. and Utah's Travel Segments (2003-2004 vs. 2004-2005 / %8-10 on 10 point scale of Person-Days)



Utah overnight leisure, Utah non-resident and Utah non-resident overnight leisure all reported higher share of “Excellent” rating for hotel service compared to that of the previous time period.







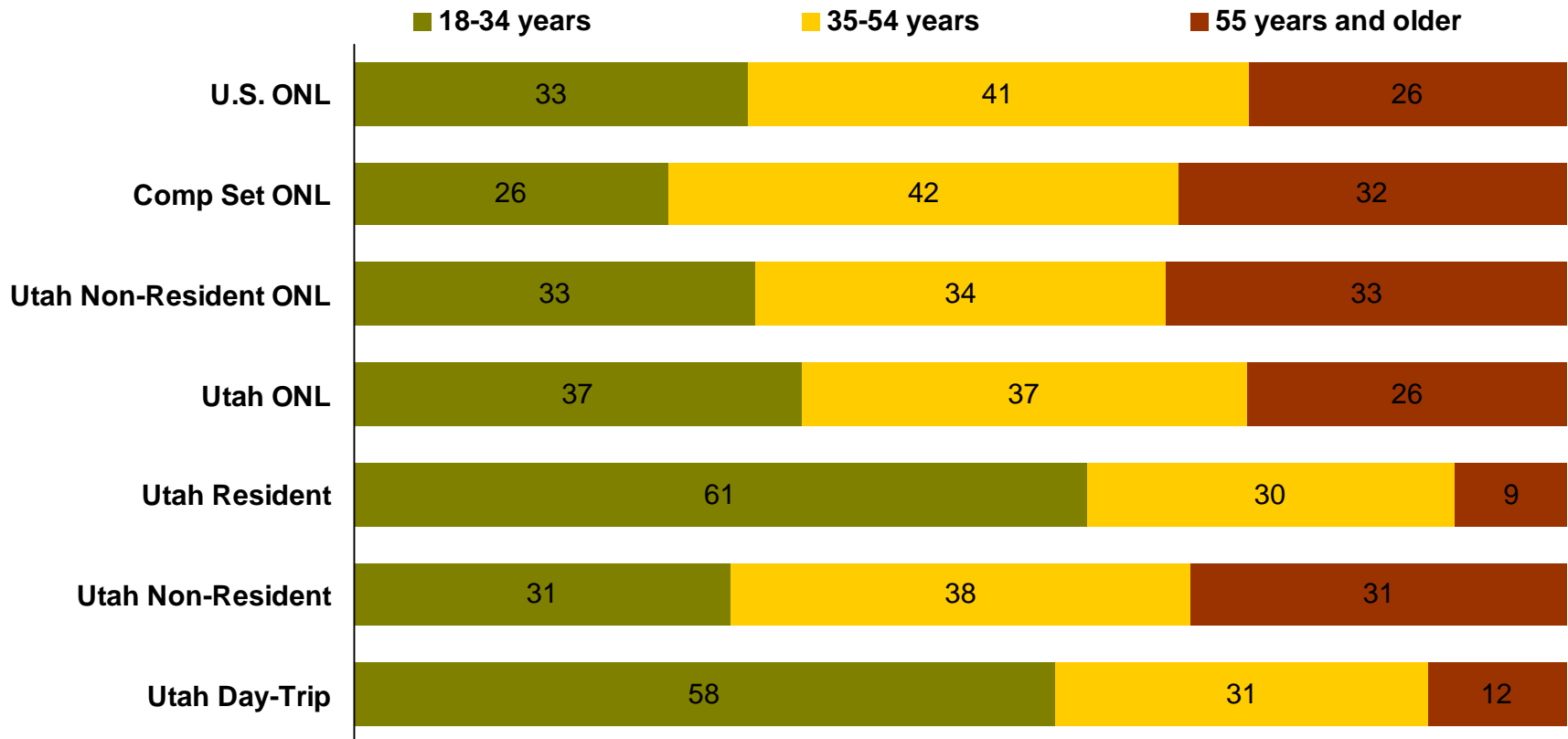
The following section provides various demographic analyses to help travel marketers and planners better target their communications. DKS&A will give the reader three ways to analyze traveler demographic profiles and the recommended use for marketing:

CHARACTERISTICS		RECOMMENDED USE
<i>Demographics:</i> basic age, income, employment, education, marital, and family status	→	For a basic description of travelers
<i>Lifestage:</i> a combination of a traveler's age, income, and family status	→	For media targeting
<i>Generation:</i> a group based on the traveler's year of birth	→	For content in public relations strategies and communications

Age Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



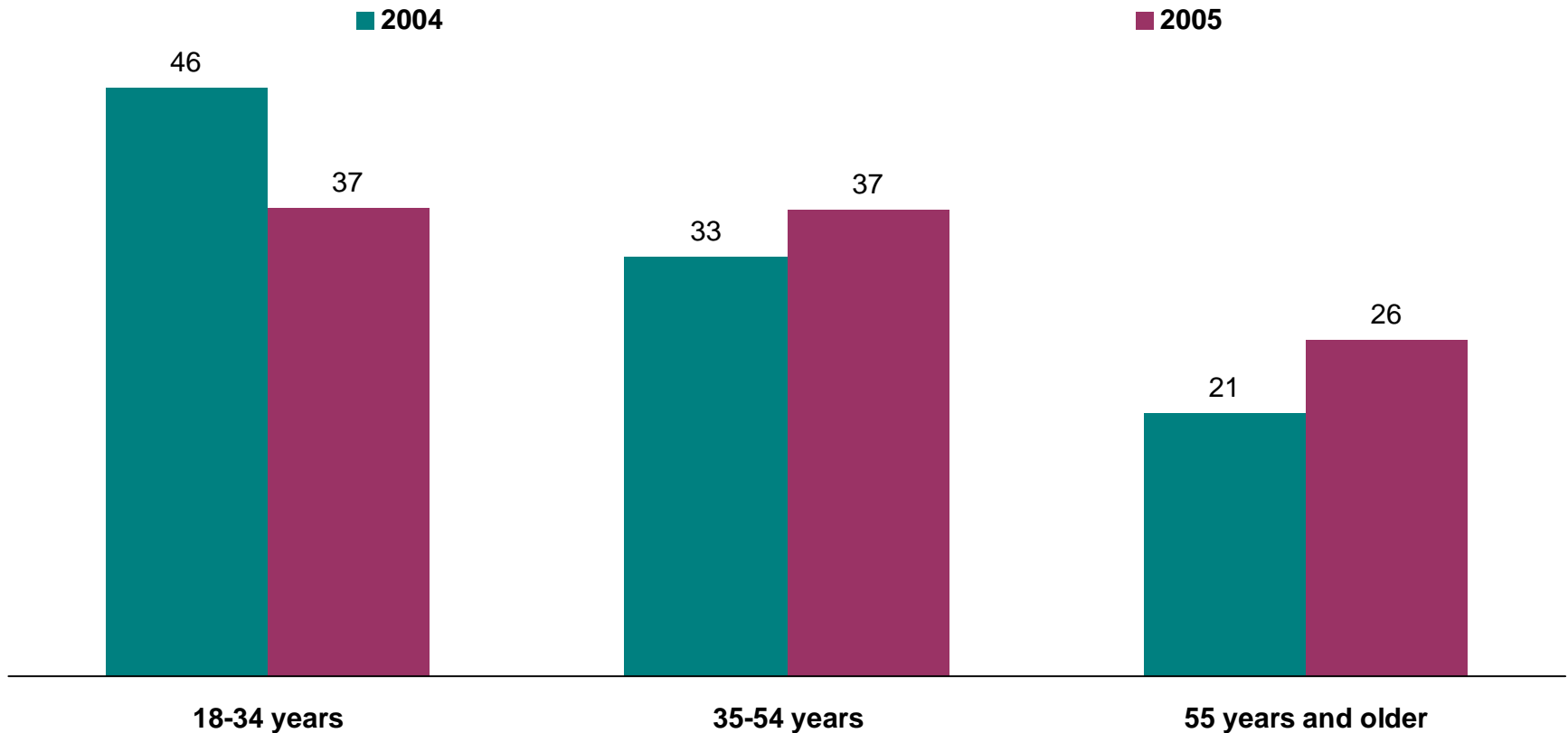
Utah's residents were more likely to be younger than Utah's non-resident travelers as two-thirds of the residents were between the ages of 18 and 34 in 2005. Fifty-eight percent of day trippers also fell into that age group. The other travel segments were fairly evenly distributed among the three age categories. Utah's non-resident overnight leisure and Utah's overnight leisure travelers were similar in distribution. Utah attracted the youngest overnight leisure travelers compared to its competitors (45 years), with the median Utah traveler age being 41 years in 2005.



Utah Age Distribution (2004 vs. 2005/% of Overnight Leisure Person-Stays)



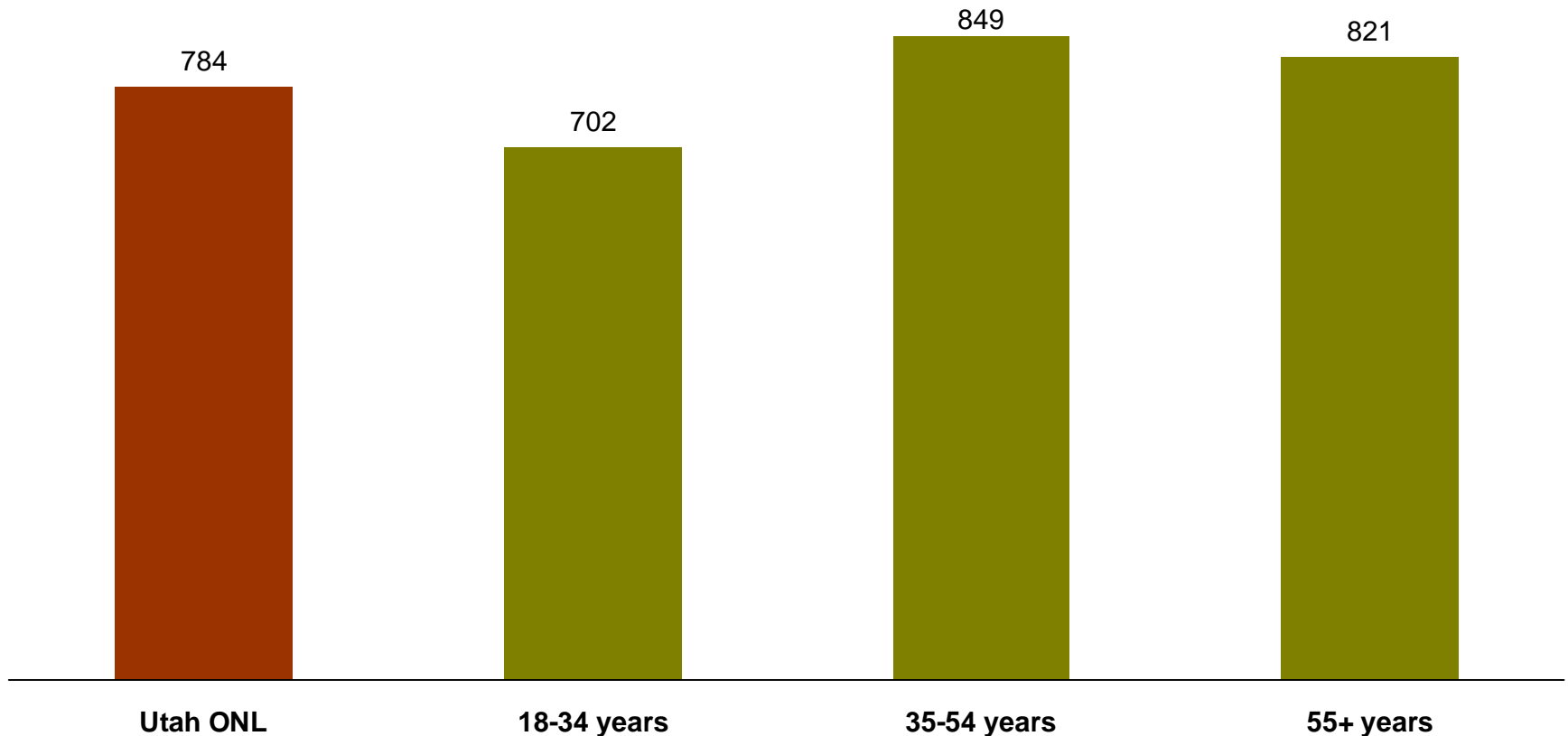
Utah received the same share of 18-34 year olds as it did travelers 35-54 years of age in 2005. This deviated from the previous year where a whopping 46% of travelers were between the ages of 18-34 and only 33% were 35-54 years old. There was also a five percentage point increase in travelers age 55+.



Utah Avg. Party per Trip Spending by Age (2003-2005/\$ Overnight Leisure Stays)



Naturally, younger travelers 18-34 years old spent below average during 2003 through 2005. Travelers ages 35-54 spent the most, at \$849 per trip.



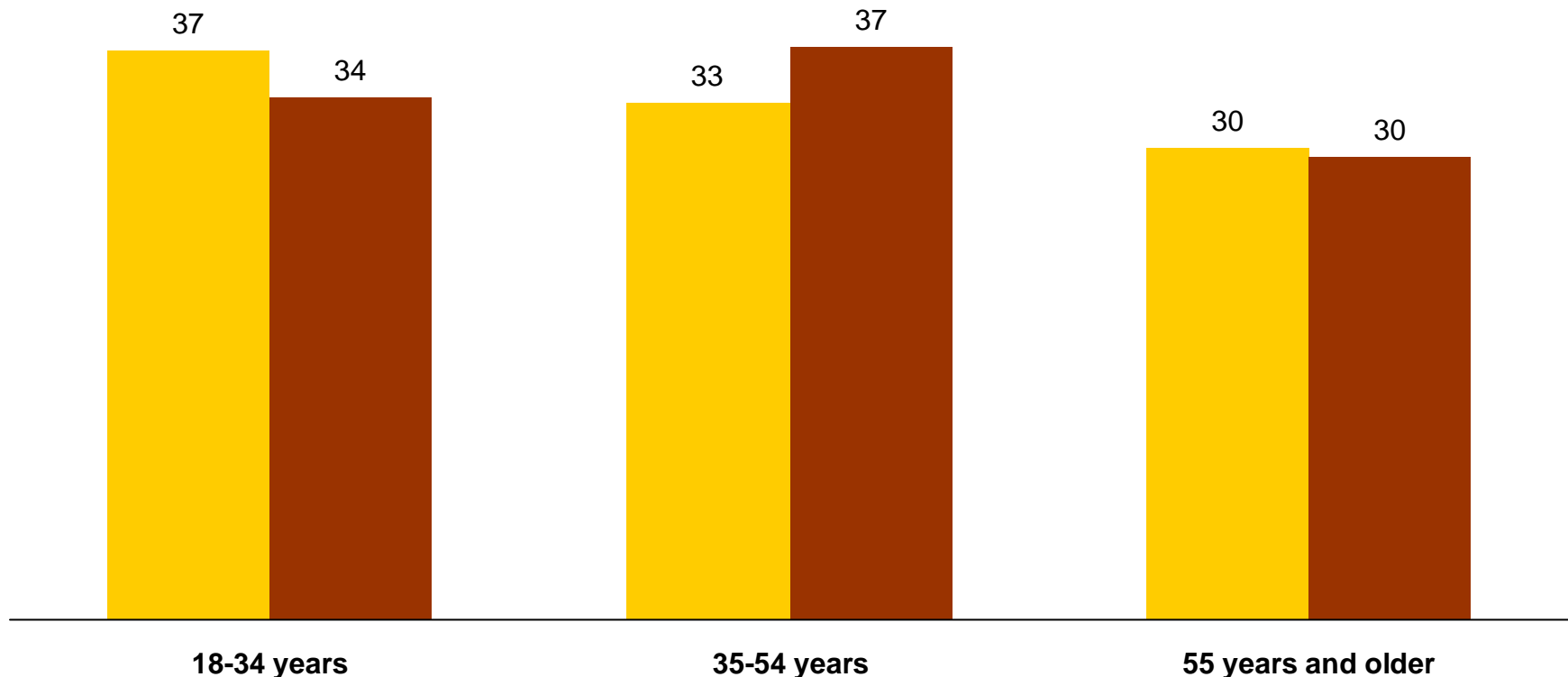
Utah Age Comparison (2003-2005/% of Overnight Leisure)



An alternative way to evaluate a travel segment is to compare their share of travel parties to their corresponding share of spending, or trip-dollars. The Boomer age travel segment (35-54 years) gained in importance during 2003-2005 because this travel segment reports the 2nd highest share of travel parties (33%), but the highest share of trip-dollars spending (37%). Younger travelers, conversely, provided a greater share of travel parties (37%) than they represent in trip-dollars volume (34%).

■ Stay Based

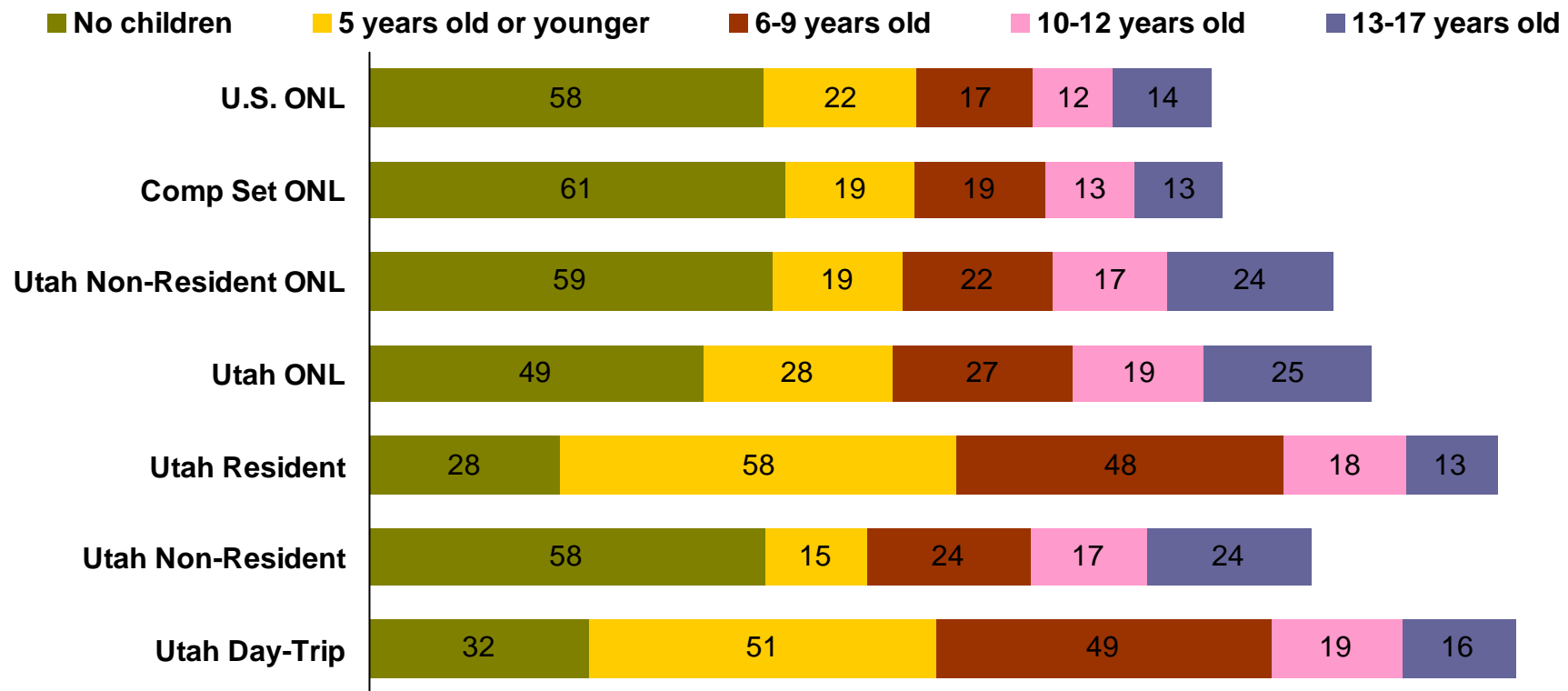
■ Trip-Dollars Based



Distribution of Children in Household: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



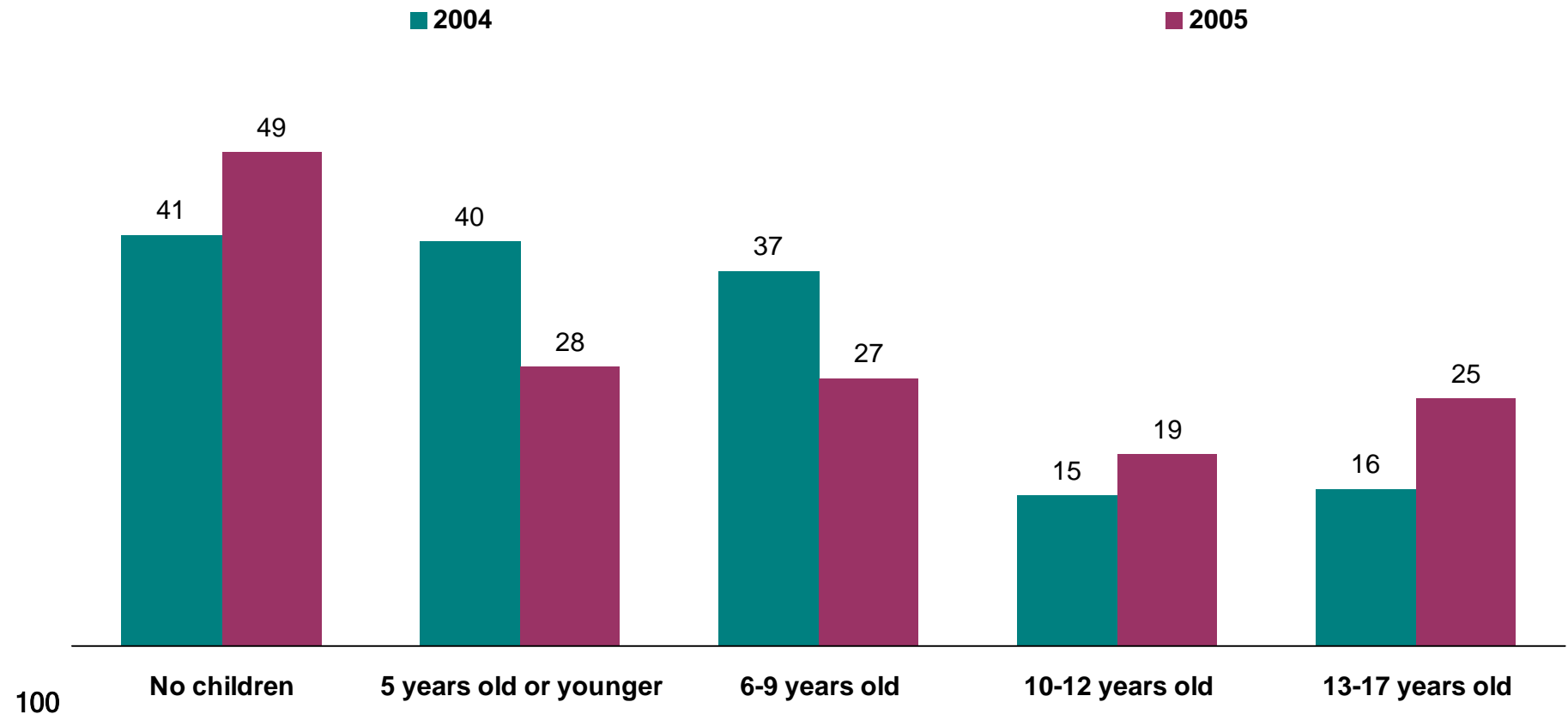
Utah non-resident overnight leisure travelers were similar to the Nation and comp set in terms of the type of households that are attracted to the destination, all slightly more than 40% of household with children. Conversely, Utah resident travelers and Utah day trippers are much alike, but very different than the Utah non-resident travelers. Utah hosts more than 70% of resident travelers with children in the household, most of them with children 9 years old or younger. Among those overnight leisure travelers with children, Utah's competing destinations attract travelers with fewer children in the household than Utah itself. *Note: Sum exceeds 100% due to multiple-children households.*



Utah Distribution of Children in Household (2004 vs. 2005/% of Overnight Leisure Person-Stays)



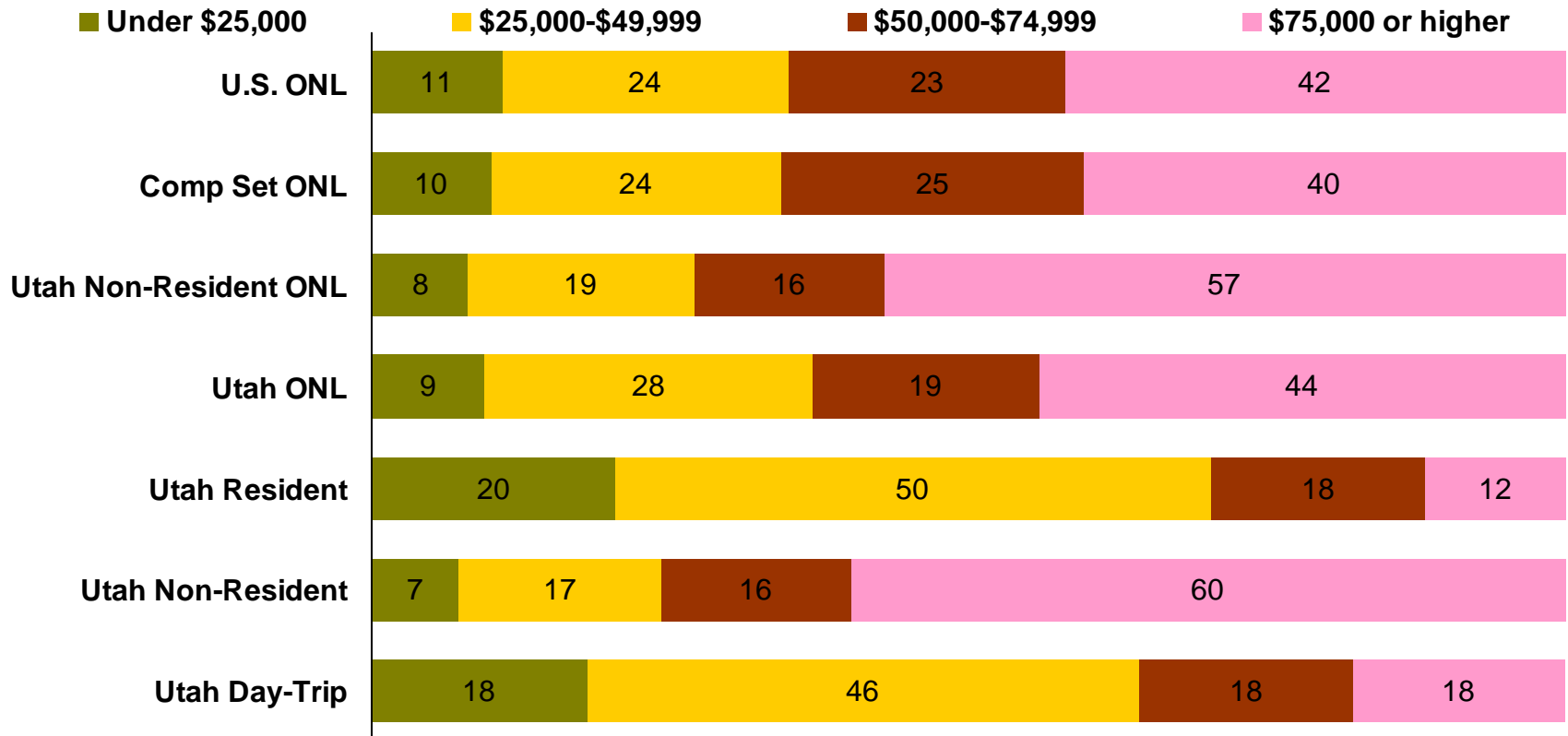
The chart below compares the distribution of children in households for overnight leisure travelers to Utah between 2004 and 2005. Utah gained shares of travelers with no children, up five percentage points, in 2005. The State also experienced a four and nine percentage point increase in travelers with children ages 10-12 and 13-17, respectively.



Household Income Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



Like most U.S. and the comp set destinations, the largest share of Utah's overnight leisure travelers have annual household incomes of \$75,000 or higher (44%) in 2005. This percentage is even higher for Non-Resident travelers (60%) and Non-Resident overnight leisure travelers (57%). Utah resident and day trip travelers have considerably lower incomes than Utah non-resident and Utah overnight leisure travelers. Half of Utah resident travelers have incomes between \$25,000 and \$49,999.



Utah Household Income Distribution (2004 vs. 2005/% of Overnight Leisure Person-Stays)



Three major shifts occurred in the distribution of household income between 2004 and 2005. There was a substantial sixteen percentage point surge in the proportion of Utah overnight leisure travelers with incomes higher than \$75,000. This gain was compensated for by the twelve and six percentage point drop in the \$50,000-\$74,999 and \$25,000-\$49,999 income categories, respectively. The Overnight Leisure traveler income mainly changed due to shifts in the Overnight Leisure Non-Resident segment.

■ 2004

■ 2005





DKS&A's lifestage analysis began in 2001 and continues in this report. Lifestage analysis combines three variables

- 1) age
- 2) household income, and
- 3) presence of children in the household

into one variable containing seven mutually-exclusive segments defined below. Because of the age component, the lifestage segments are "moving targets" from year to year.

Age: 18-34 Age of the household head.

- 1) Free No children under 18 in the household
- 2) Family One or more children under 18 in the household.

Age: 35-54 Age of the household head.

- 3) Free No children under 18 in the household
- 4) Lo Fmly Annual household income under \$50K and one or more children under 18 in the household.
- 5) Hi Fmly Annual household income \$50K or higher and one or more children under 18 in the household.

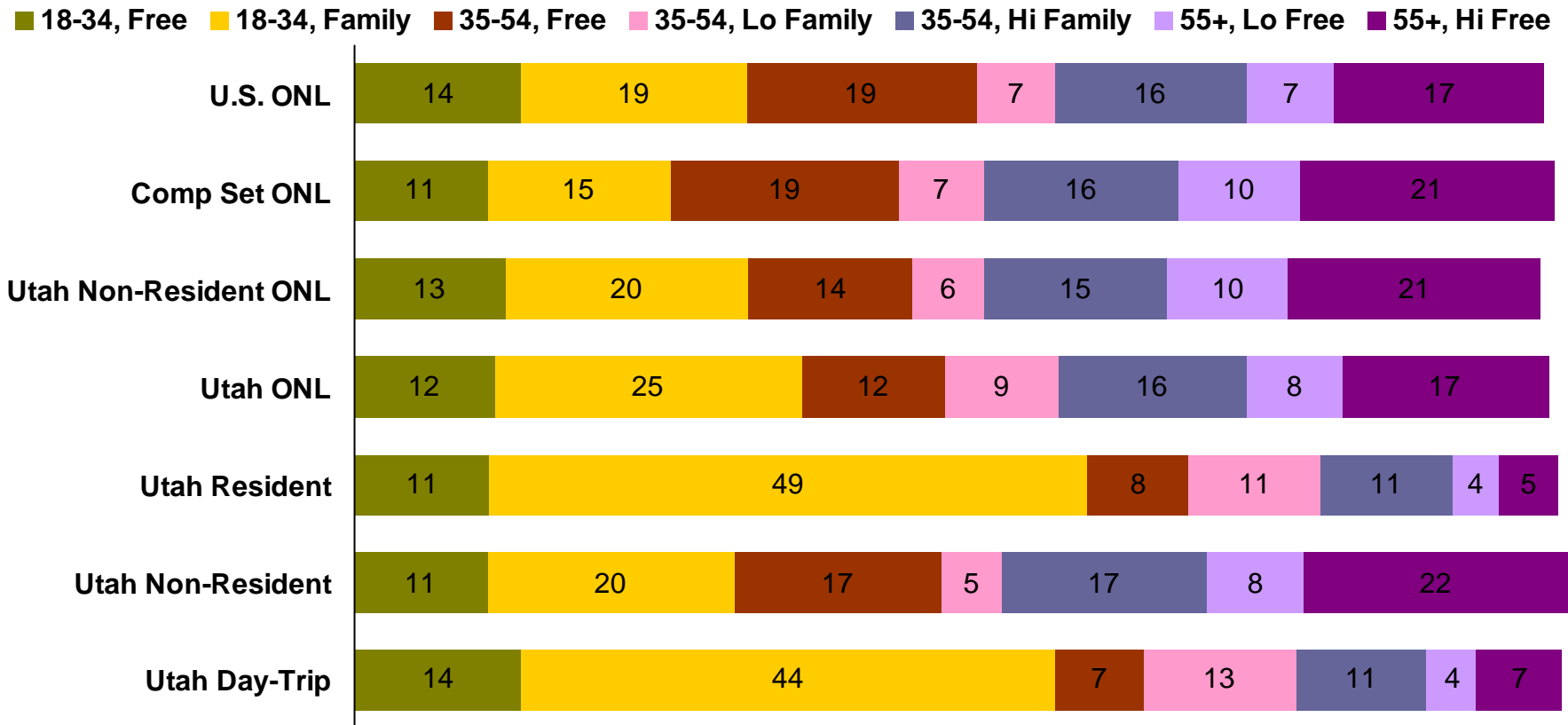
Age: 55+ Age of the household head.

- 6) Lo Free Annual household income under \$50K and no children under 18 in the household.
- 7) Hi Free Annual household income \$50K or higher and no children under 18 in the household.

Lifestage Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



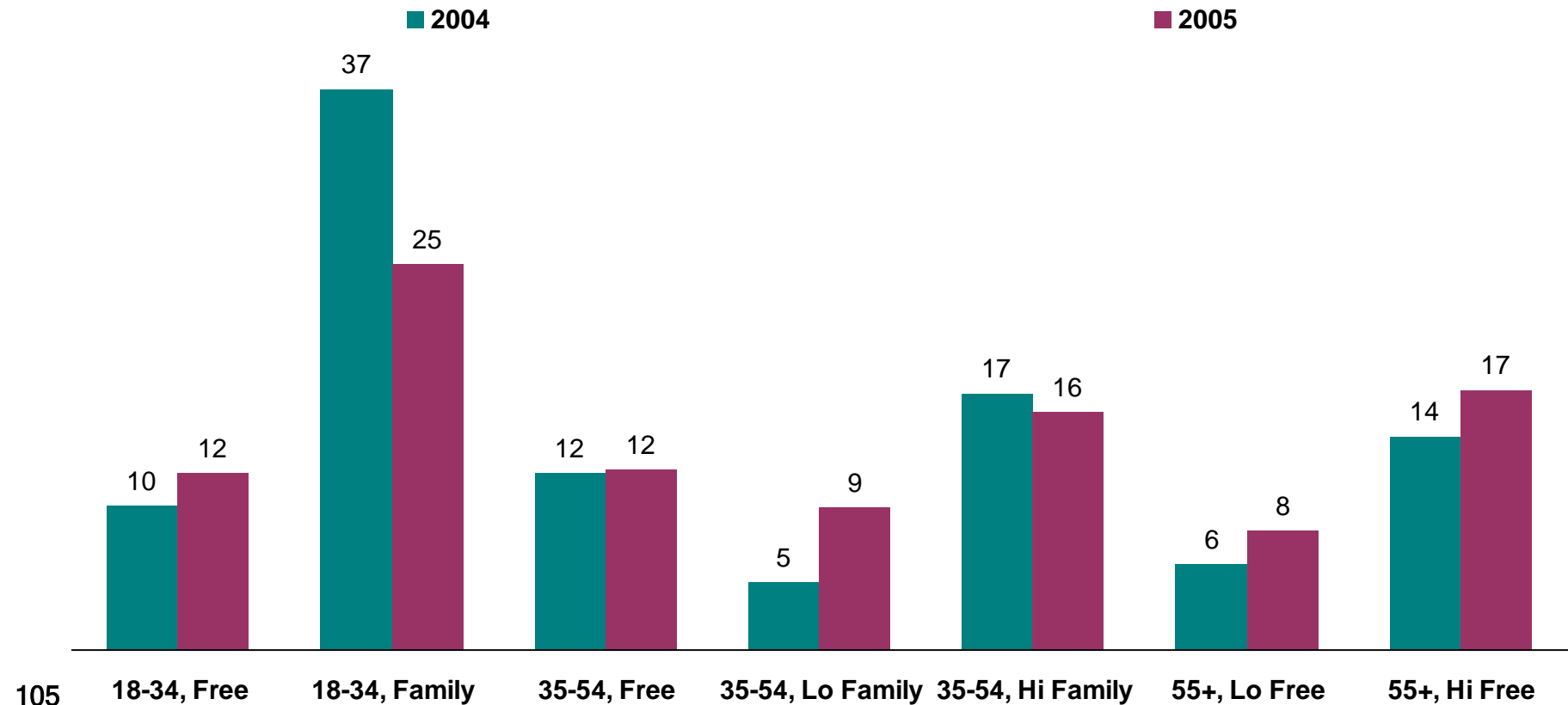
The greatest proportion of Utah overnight leisure visitors are in the lifestage defined by 18-34 Families. Residents and day trippers are the drivers of this high share segment where almost half of Utah residents (49%) belong to the 18-34 Family lifestage.



Utah Lifestage Distribution (2004 vs. 2005/% of Overnight Leisure Person-Stays)



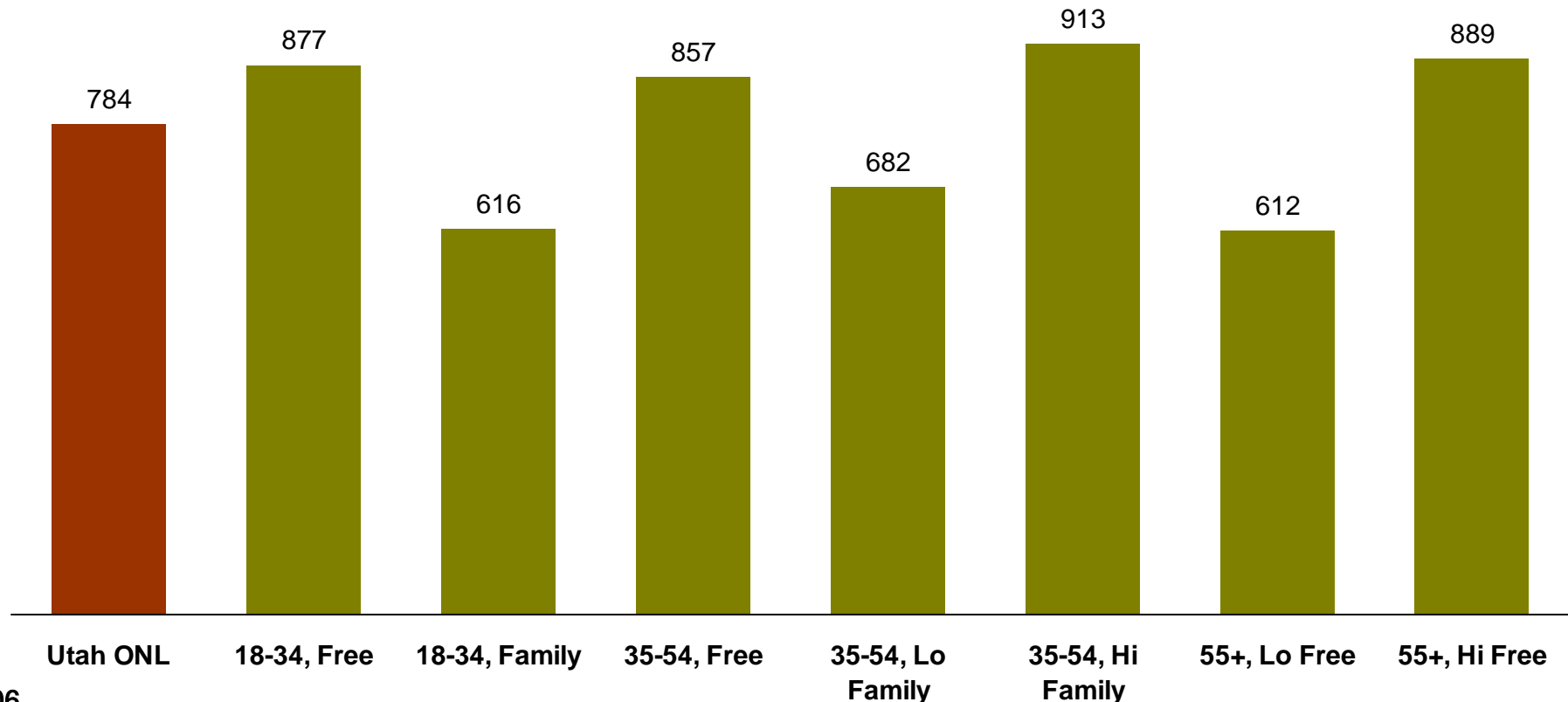
Utah experienced a shift in lifestages in its overnight leisure travel market. Even though, there was a drastic twelve percentage point drop in the share of 18-34 families, this category continues to receive the biggest share of all Utah travelers. This drop was balanced out by smaller increases in all the other categories except for the 35-54 Free and 35-54 Hi Family, which remained stable between 2004 and 2005.



Utah Avg. Party per Trip Spending by Lifestage (2003-2005/\$ Overnight Leisure Stays)



More than half of Utah's travel party lifestages emerged as the highest spending groups of overnight leisure travelers during 2003 through 2005, including the 35-54 Hi Family (\$913) and 55+ Hi Free (\$889) lifestage categories. This high dollar amount links up well with the increase in proportion of these travelers from 2004 to 2005. Overnight leisure travel parties in the 18-34 Family, 35-54, Lo Family, and 55+, Lo Free lifestage spent below average per trip.



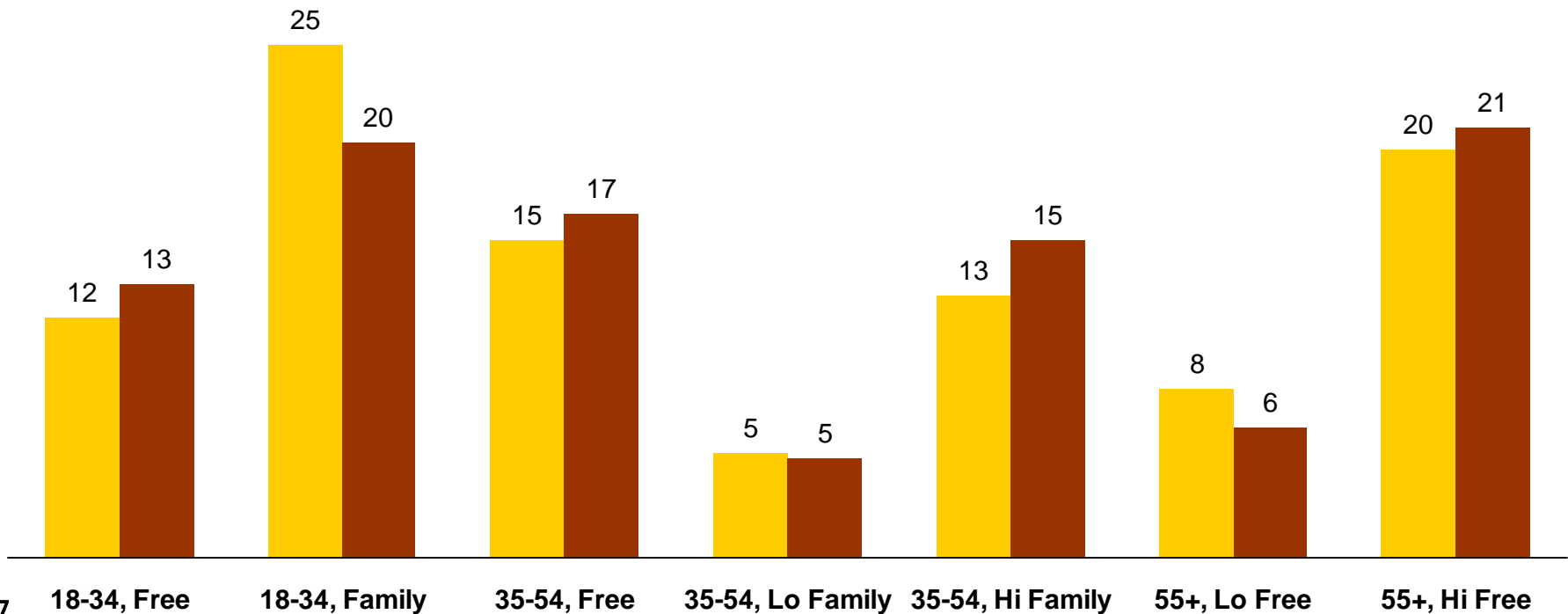
Utah Lifestage Distribution (2003-2005/% of Overnight Leisure)



When evaluating the spending potential in proportion to travel party volume during 2003 through 2005, the 18-34 Family as well as 55+, Hi Free lifestage emerged as the highest providers of both measures. The 18-34 family lifestage provided the highest shares of parties but a five percentage point lower share of trip-dollars, making these travelers worth less on an individual monetary basis. All the other lifestages, except for 55+ Lo Free contributed equal or slightly more spending shares relative to stays.

■ Stay Based

■ Trip-Dollars Based





With an increasing interest in generational behavior, DKS&A has added a Traveler Generation Analysis to help destinations understand the composition of their visitors in terms of the generations they represent. The analysis will supplement other demographic profiles (age and lifestage) by adding a means to target marketing messages to various generational segments.

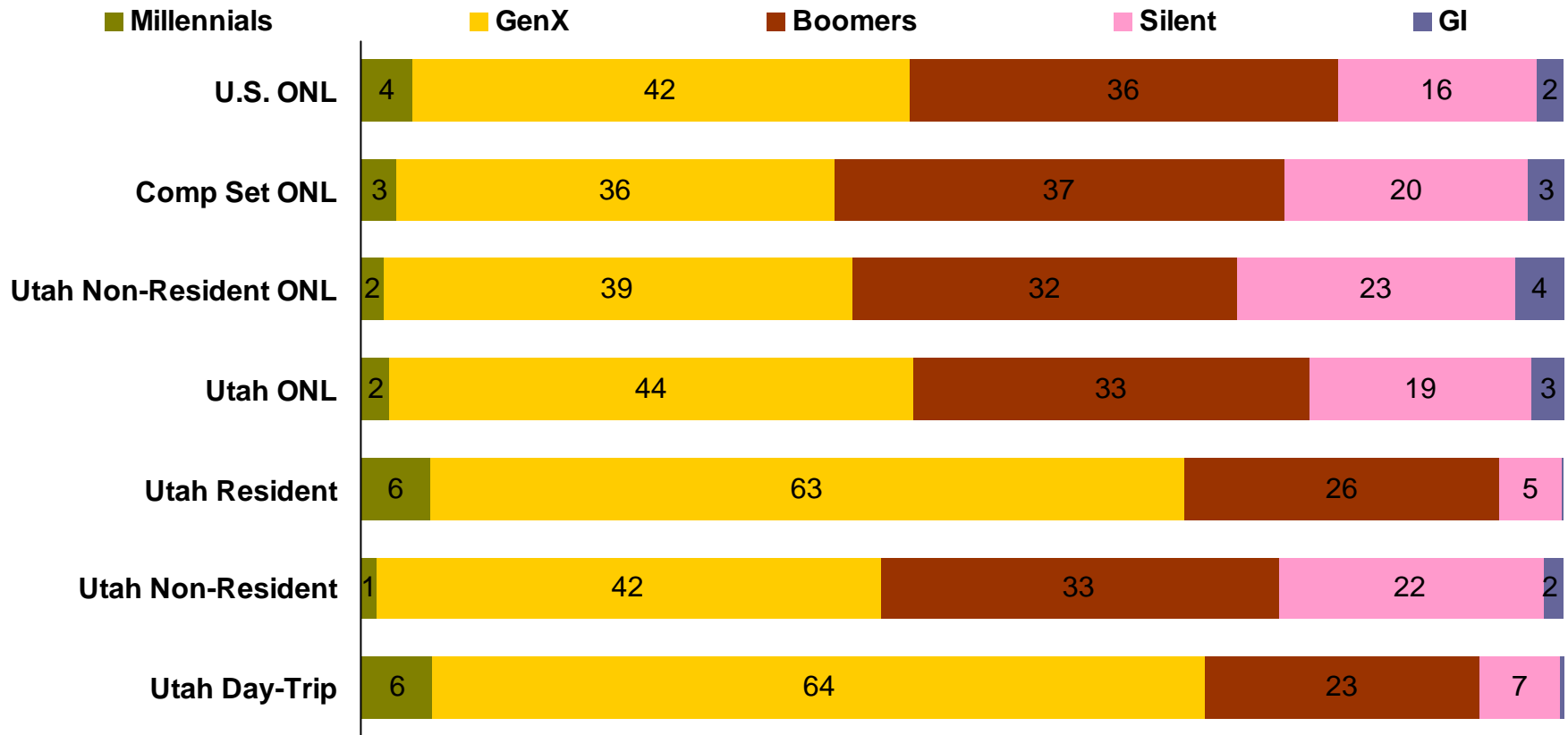
The following defines the generations by year of birth:

Millennial	After 1981
Gen X	1965-1980
Boomers	1946-1964
Silent	1930-1945
GI	1929 and earlier

Traveler Generation Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



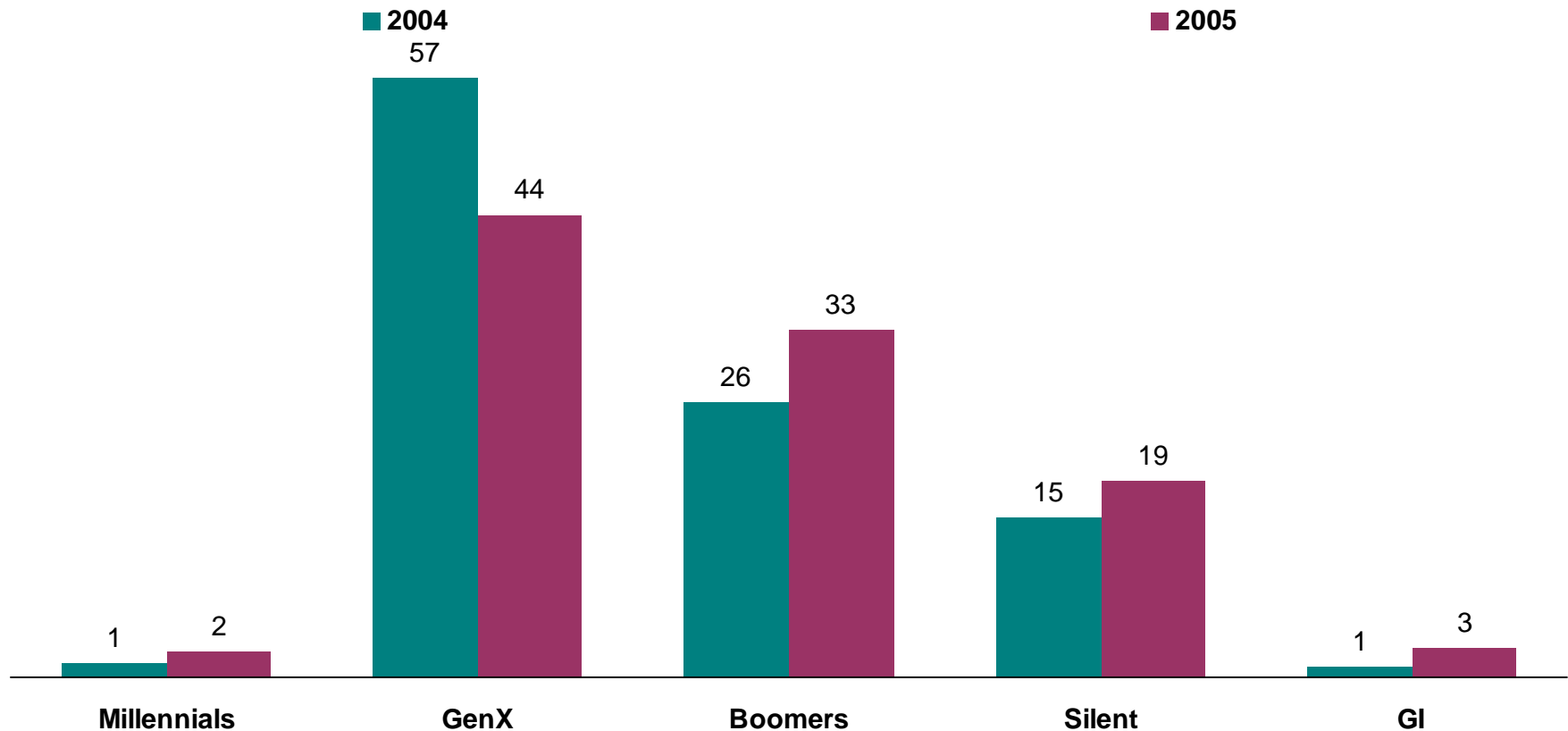
Gen X segment stands out as Utah's dominant overnight leisure travel generation, especially among Utah Resident and day travelers, followed by travelers falling into the boomers and silent generation. Utah attracts the lowest proportion of the boomer segment (33%) and the highest share of GenX travelers (44%) relative to its competitor set.



Utah Traveler Generation Distribution (2004 vs. 2005/% of Overnight Leisure Person-Stays)



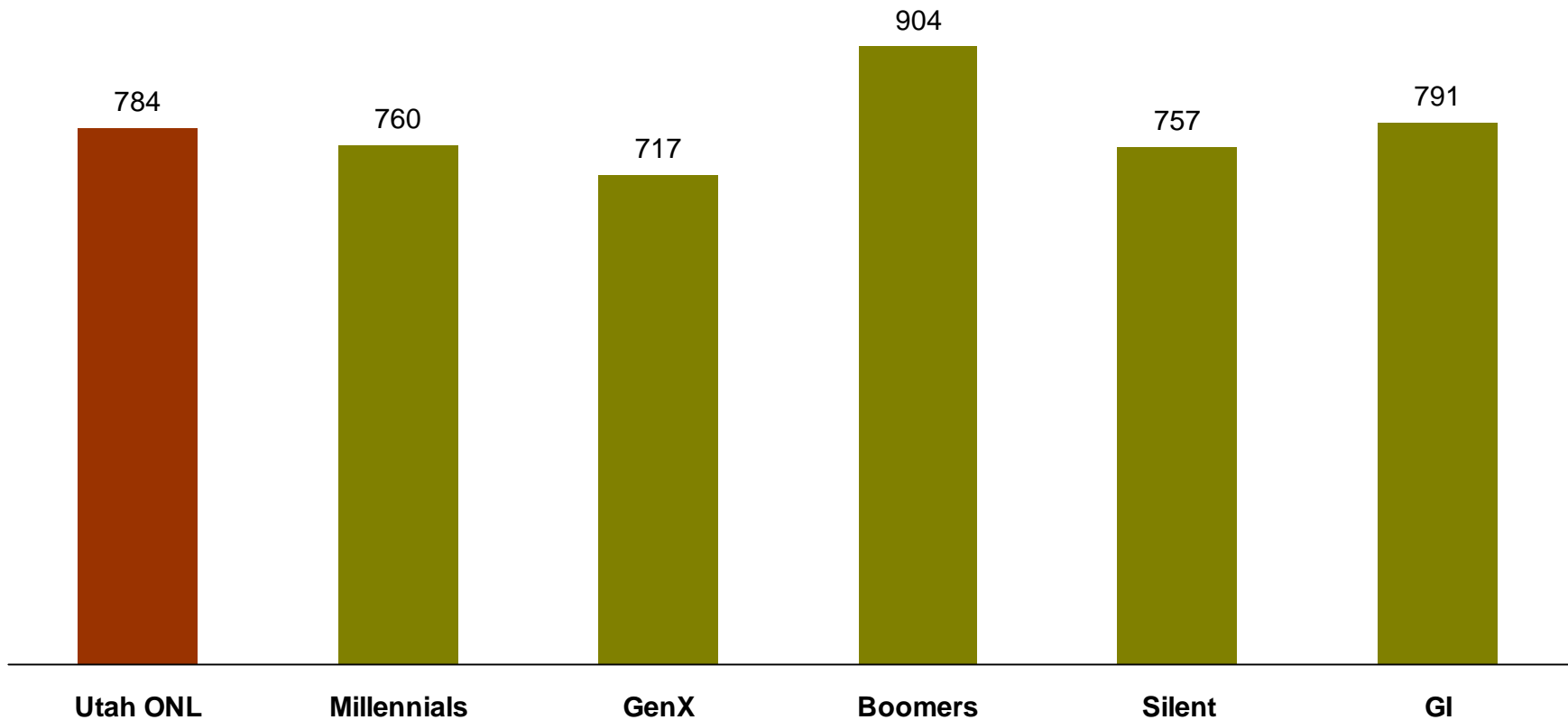
There was a seven and six percentage point drop in the proportion of Boomers and Silents in 2005 relative to 2004. This balanced out the 14 percentage point drop in GenX overnight leisure travelers to Utah. This distribution is parallel to the age distribution which showed the share of younger travelers dropping.



Utah Avg. Party per Trip Spending by Generation (2005/\$ Overnight Leisure Stays)



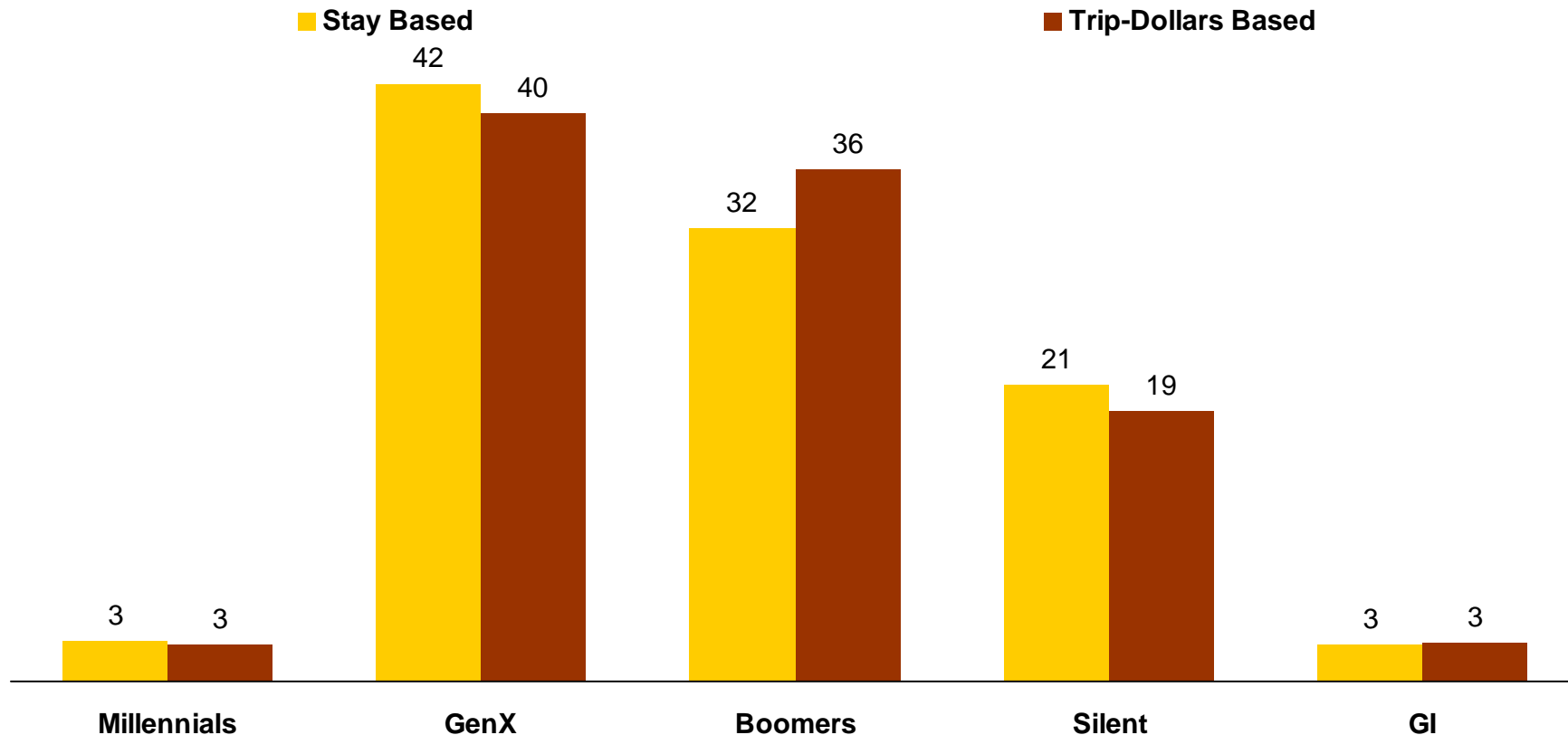
Utah's Boomers (\$904) and GI (\$791) overnight leisure travelers contributed higher than average spending per party per trip during 2003 through 2005, while the remaining generational groups spent slightly less than average per party per trip (\$784). Spending by the different generational segments did not vary substantially as the difference between the greatest spenders (Boomers) and the group spending the least, GenX (\$717), was less than \$200.



Utah Generation Comparison (2003-2005/% of Overnight Leisure)



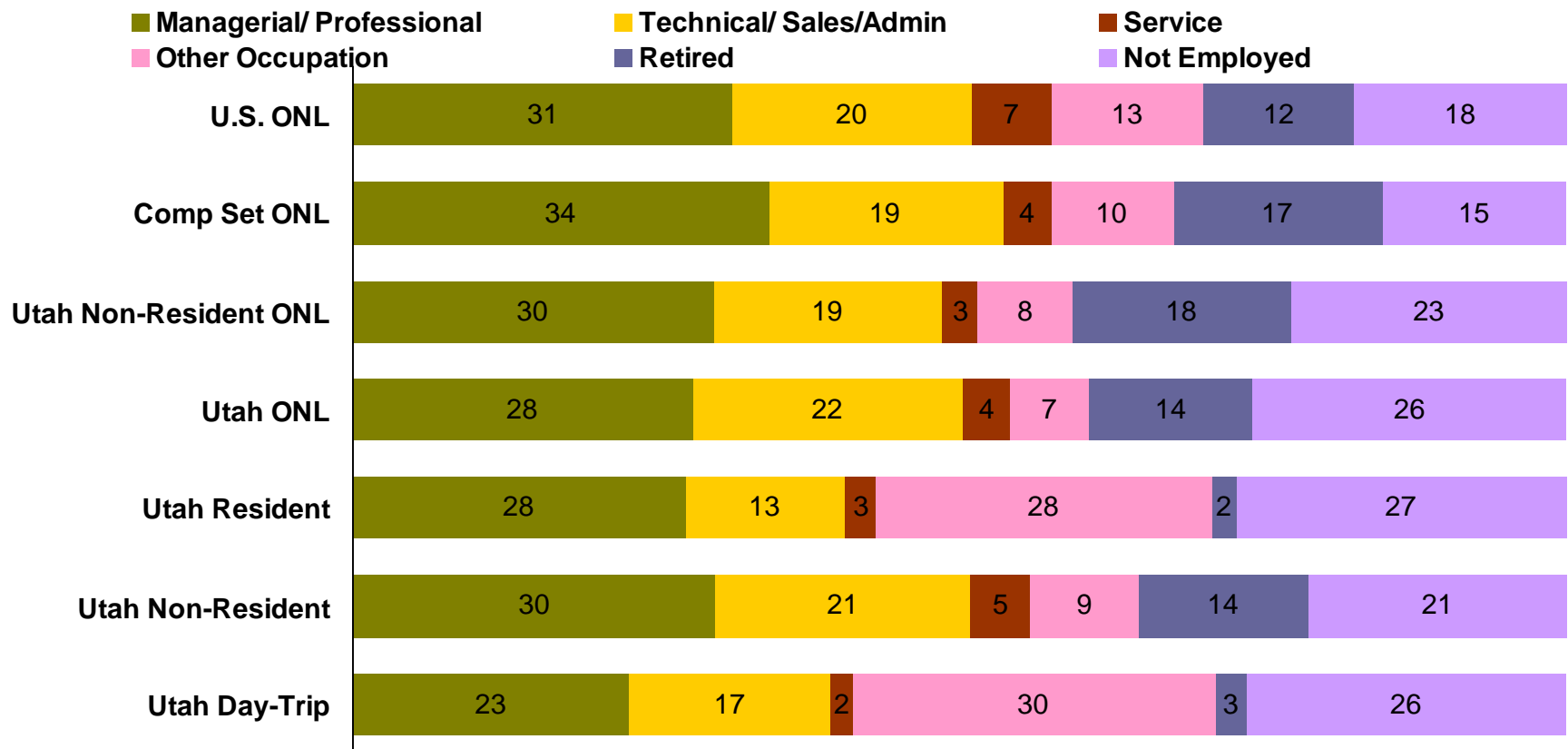
As the previous slide revealed, GenX generation (\$717) had the lowest party per trip spending in Utah. Even through GenXers have a lower spending propensity (40%) than their travel party volume (42%), it still contributes the highest shares in both measures. Conversely, Boomers made up 36 percent of all trip-dollars but only 32 percent of stays, making this generation the one with greatest monetary value to the State.



Occupation Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



As revealed in other graphs, the distribution among Utah residents and Utah day-trippers is quite similar. A large proportion of those travelers reported working in “other occupations” and “not employed” but only a small share reported being retired. All segments traveling to Utah contributed larger shares of unemployed travelers relative to the U.S., while the comp set reported the lowest share of unemployed travelers (15%).



Utah Occupation Distribution (2004 vs. 2005/% of Overnight Leisure Person-Stays)



Alarming,ly, Utah attracts one of the nation's highest shares of unemployed overnight leisure travelers and only a small proportion of managerial/professional overnight leisure travelers in 2004 and 2005. Utah received twice as many retired travelers in 2005 (14%) compared to 2004 (7%).





The overnight leisure visitors to Utah can be described in three ways; basic demographics, lifestages, or by generation.

Demographics

- The largest share of overnight leisure visitors in Utah fall in the 18-34 and 35-54 age cohorts, each representing 37% of travelers. Utah overnight leisure's share of 18-34 segment is notably higher than that of the U.S average (33%) and comp set (26%). However, the 35-54 age segment is another favorable segment due to its size (34%) and its spending potential which accounts for 37% of overnight leisure traveler spending in Utah.
- In terms of general trends, Utah residents and day-trippers' demographical characteristics are very homogenous but differ greatly compared to Utah's other travel segments. Day-trippers and residents of the State not only tend to be younger in age, but subsequently also report lower average household incomes. The income distribution of Utah's other travel segments is similar to the general U.S. trend. The growth resulted more from the \$8K increase in income average among Non-Resident Overnight Leisure than Resident Overnight Leisure travelers. For the first time since 2001, Utah reached overnight leisure travelers with average incomes on par with the U.S. and comp set levels.

Targeting Intelligence Summary (con't)



Lifestages

- Lifestages combine traveler age, income, and family status into one distinct segment, creating seven possible lifestages that a destination can attract. Utah's largest lifestage, in terms of person-stays travel volume, are the 18-34 Family lifestage, accounting for 25% of the overnight leisure market and with almost half of day trippers and Utah residents falling in to that category. While the 18-34 Family segment is dominant in Utah, the 55+, Hi Free lifestage is another favorable target due to its propensity for increased spending, both lifestage groups accounting for 20% and 21%, respectively, of spending in the overnight leisure segment..

Generation

- Finally, the generation shared most by overnight leisure travelers in Utah are GenXers, representing 44% of the market, declining from 57% in the previous timeperiod. Boomers follow in rank accounting for 33% of the overnight leisure market in Utah, growing from 26%. Utah faces competition when targeting the Boomer segment as the comp set attracts a larger share of this segment. The opposite is the case for targeting GenXers.
- In terms of targeting generations by spending potential, the GenX segment accounts for 40% of all overnight leisure spending. The GenX segment holds its weight where their share of volume (42%) is almost equitable to their share of spending (40%). However, the Boomer segment has a slightly higher spending potential compared to their share of travel party volume.

Targeting Intelligence Summary (con't)



Generation (con't)

- Unusual for most U.S. destinations, Utah attracted a range of people in different occupations. Utah's employment share is about the same among Resident and Day-trip travelers, approximately 70 percent. The Utah Overnight Leisure market on the other hand attracts 61 percent and among Utah Overnight Non-Residents only 58 percent of employed travelers. Utah attracts a much larger share of retired and unemployed overnight leisure travelers than any average U.S. destination. Surprisingly, the retired status is almost non-existent among Resident and Day trippers (about 2% to 3%).
- Unemployment shares are similar across all of Utah's travel segments from 21 percent among Non-Resident to 27 percent among Resident travelers, and much higher than the U.S. (18%) and comp set (15%).





- The Positioning section will help a destination compare its tourism product attributes against the competition. These attributes include a traveler's purpose of visit, Stays composition, activities participated in at the destination, and repeat visitation. This intelligence highlights a destination's product strengths that can be promoted to attract new travelers or repeat visitors. It can also help destinations better differentiate themselves in a competitive travel market.
- The following bullet points will define some details that will be found in the *Positioning* section.
 - *Repeat visitation* represents the number of visits to the destination in the past three years, including the visit being reported.
 - *See Friend/Relative* is a visitor's purpose of stay and represents visiting friends and relatives.
 - Stays composition
 - *Family Stays* is defined as one or more adults accompanied by one or more persons under age 18. The child does not necessarily have to live in the household.
 - *MM/FF Stays* include either two females or two males from different households traveling together
- Five attributes (purpose of stay, party composition, stay length, trip timing, and accommodation type) include an additional analysis in this section that compares the segment's share of the destination's total visitors compared to their spending contribution in the market. This analysis is illustrated by comparing the proportions of total travel using a Person-Stays weighting versus a trip-dollars weighting. Trip-dollars weighting reflects the total Stays spending made by all party members at the destination.

Purpose of Stay Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



The majority of visitors traveling to Utah come for purposes of visiting friends and relatives, the segment with the highest shares of VFR travelers being Utah non-resident overnight leisure travelers (40%). A substantial portion of day trippers travel for other personal (30%), VFR (27%) and special events (17%). A greater proportion of non-resident overnight leisure travel for general vacations (28%) relative to the U.S. average (19%) and comp set (24%).



Utah Purpose of Stay Distribution (2004 vs. 2005/% of Overnight Leisure Person-Stays)



Utah's purpose of stay distribution experienced several changes during the past two years. There was a six percentage point jump in other personal travel along with a three percentage point increase in travelers coming for getaway weekends. Evening out this growth were the drops in special event travel (down five percentage points) and visiting friends and relatives (down four percentage points).

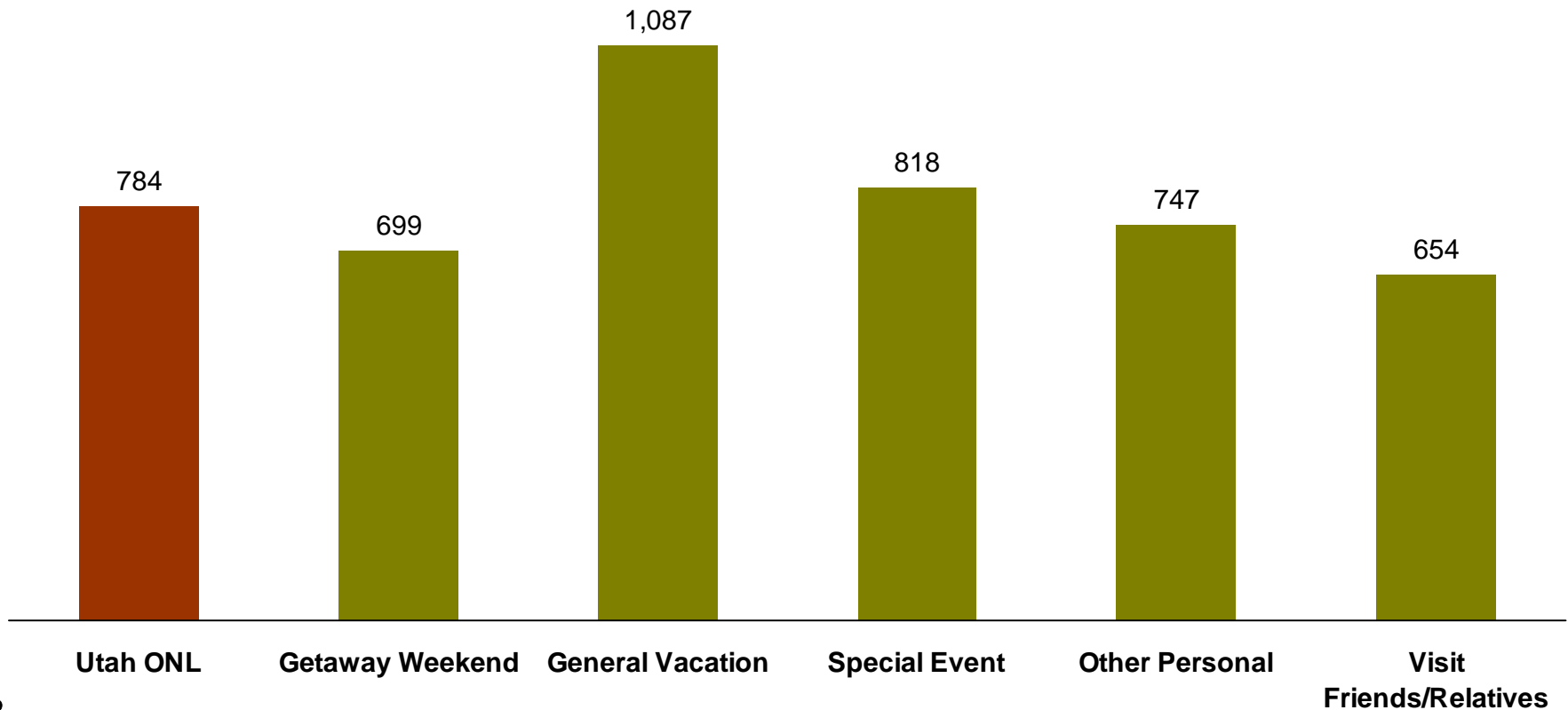
Note: Other Personal likely includes travel for medical treatment, visiting colleges, looking for real estates, and other similar purposes. ■ 2004 ■ 2005



Utah Avg. Party per Trip Spending by Purpose of Stay (2003-2005/\$ Stays)



Travel parties on general vacations spend the most per trip during the 2003 through 2005 time period (\$1,087). Those traveling for special events spent \$818 per trip, also about Utah's average overnight leisure spending. Travelers visiting for all other purposes spent below average.



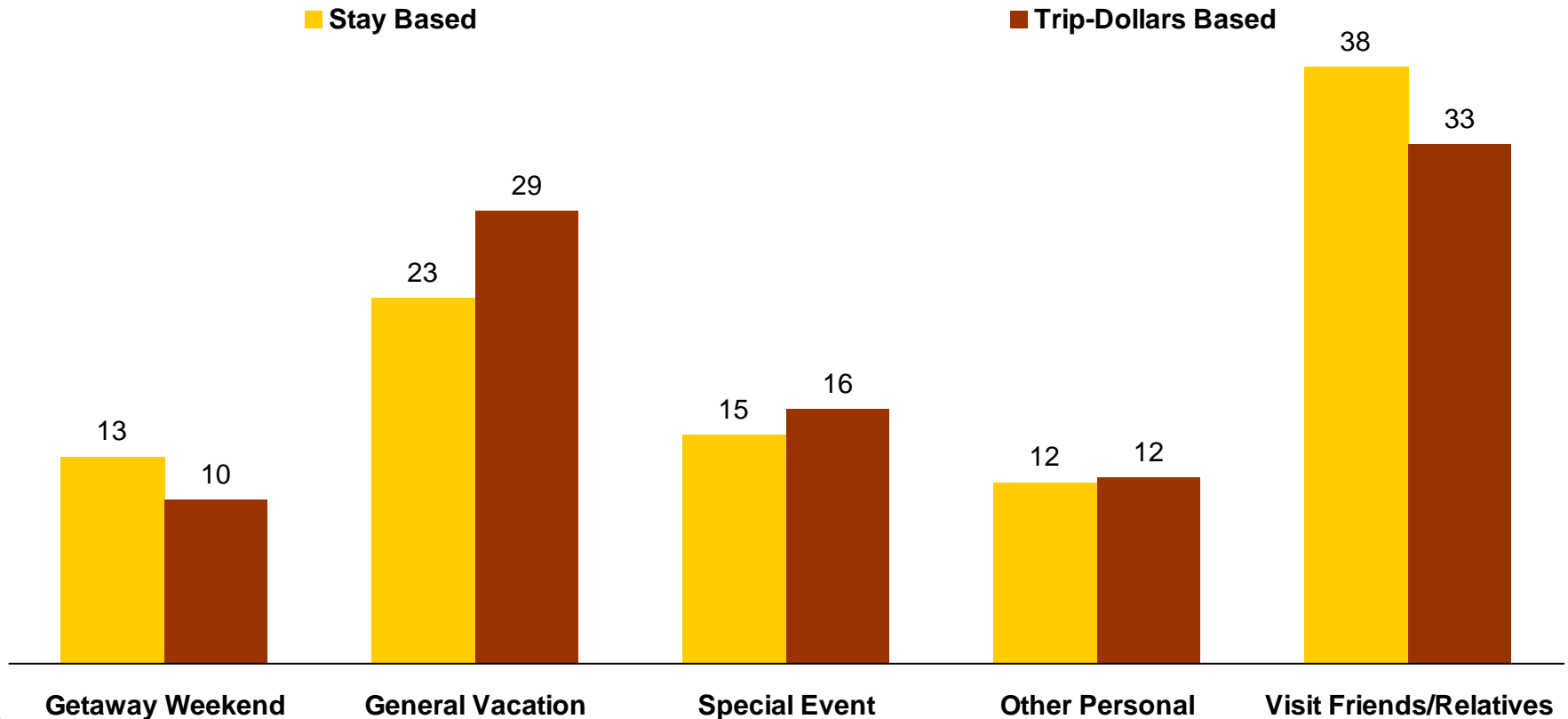
Utah Purpose of Stay Comparison (2003-2005/% of Overnight Leisure)



When comparing the share of travel parties and its corresponding spending potential during 2003 and 2005, it is revealed that the highest share of overnight leisure travel parties is visiting friends/relatives in Utah (38%) but, naturally, only generates one third (33%) of traveler spending at the destination. In a reverse relationship, general vacationers who account for 23 percent of all travel parties in Utah generate 29 percent of all traveler spending which makes this segment a particularly important one to target.

■ Stay Based

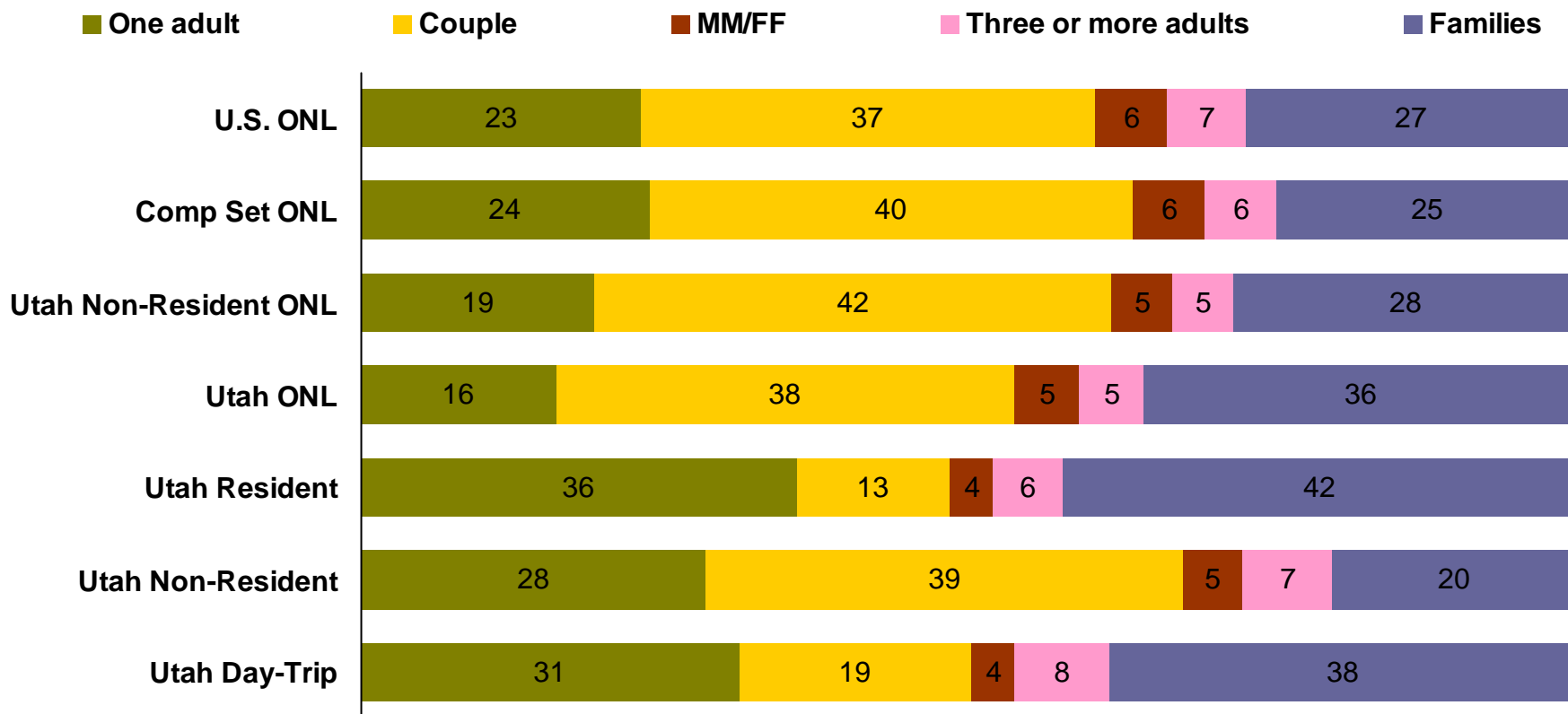
■ Trip-Dollars Based



Party Composition Distribution: U.S. Comp Set and Utah's Travel Segments (2005/% of Stays)



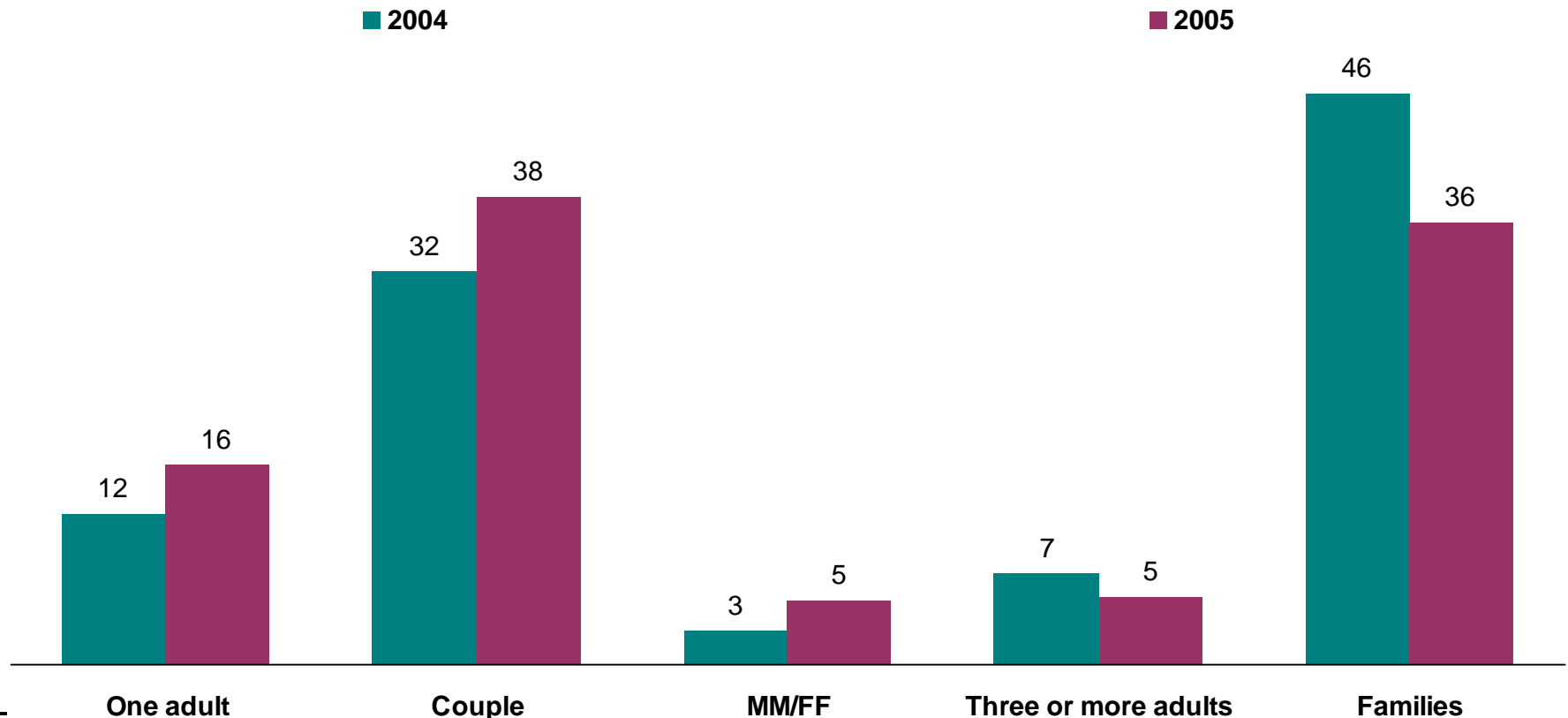
The majority of Utah overnight leisure travel parties were comprised of couples (38%) in 2005, followed by 36 percent of this travel segment visiting with families. One adult (36%) and family travel (42%) were dominant travel parties among Utah Residents party composition as for all of Utah's travel segments presented in the graph. Utah overnight leisure travel parties consisting of adults traveling alone (16%) were considerably less than the U.S. average (23%) and comp set average (24%).



Utah Party Composition Distribution (2004 vs. 2005/% of Overnight Leisure Stays)



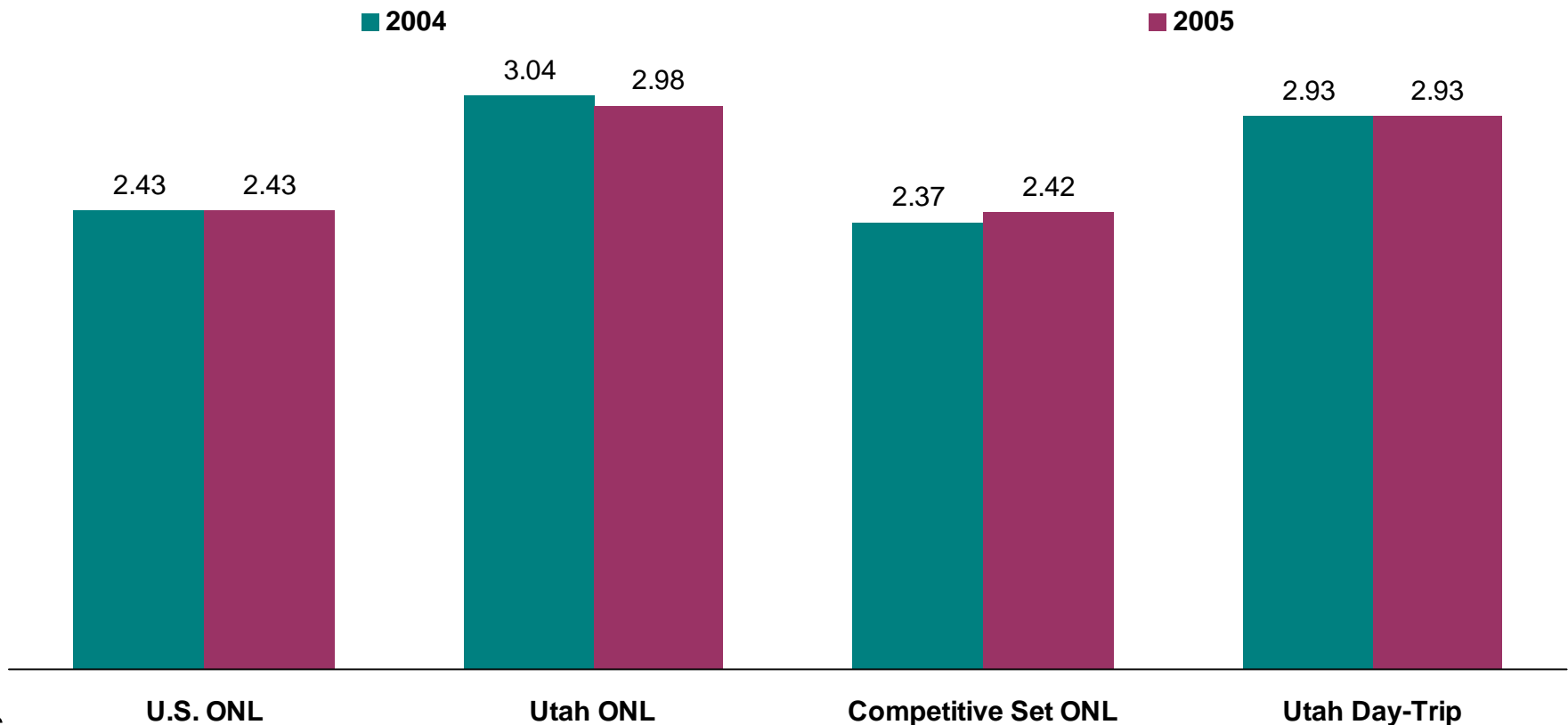
Travel by couples was on the rise in Utah in 2005 relative to 2004 as it increased six percentage points to 38 percent. This increase as well as the growth in adults traveling alone (up four percentage points) and MM/FF (up two percentage points) in 2005 was offset by the decline in families. Family travel was far more dominant in 2004 than in 2005 as it was overtaken by traveling couples in 2005.



Average Party Size Overview: U.S. and Utah's Travel Segments (2004 vs. 2005/% of Stays)



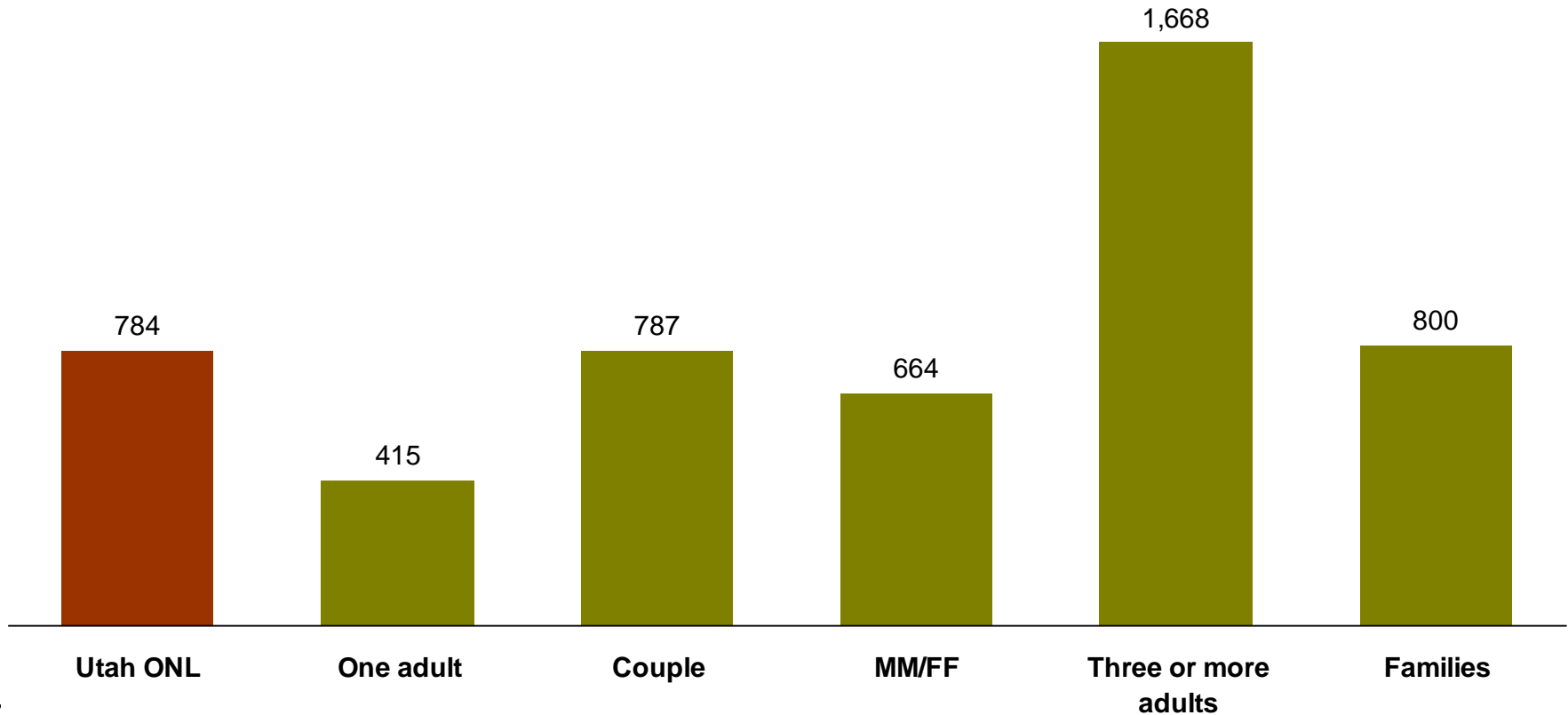
Average travel party sizes are highest for Utah overnight leisure stays. The overnight leisure travel party size peaked for Utah in 2003 after two years of increase, and fell since then, reaching 2.98 persons in 2005. Utah Day-trippers followed with the second highest average party size (2.93 persons).



Utah Avg. Party per Trip Spending by Traveling Party (2003-2005/\$ Overnight Leisure Stays)



In the Utah Overnight Leisure travel market, the travel parties that have a higher average party trip spending during 2003 and 2005, include Three and more adults (\$1,668), families (\$800), and couples (\$787). Travel parties comprised of three or more adults spent over twice as much (\$1,688) as the average overnight leisure travel party (\$784). Adults traveling alone spent the least (\$415).



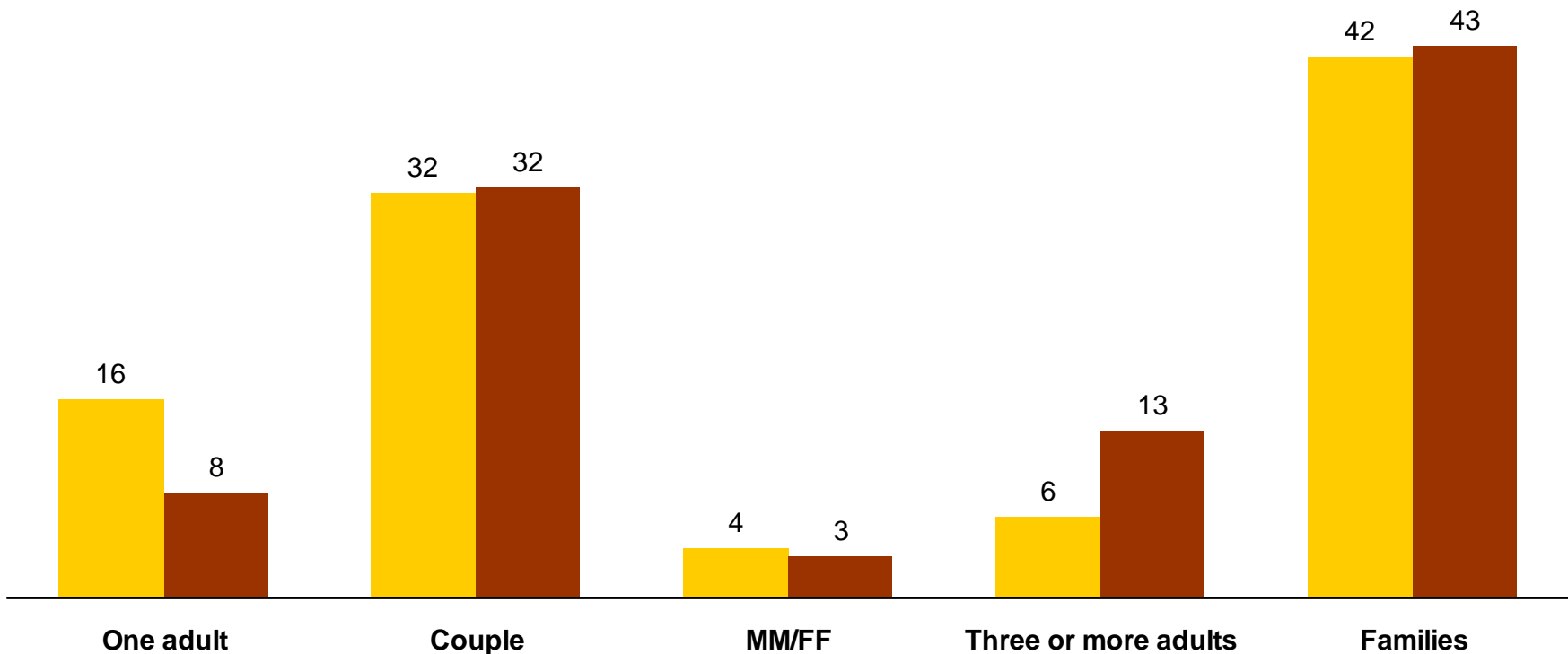
Utah Stays Composition Comparison (2003-2005/% of Overnight Leisure)



This analysis shows that the most dominant travel segments, families and couples, both generate the same proportion of shares in travel parties as they do in spending. Travel parties made up of three or more adults, however, contribute almost twice as much in spending (13%) as in stays (6%), meaning that these travelers are worth more on an individual monetary basis. Conversely, adults traveling alone generate 16 percent of Utah's overnight leisure stays shares but only 8 percent of the corresponding trip-dollars shares.

■ Stay Based

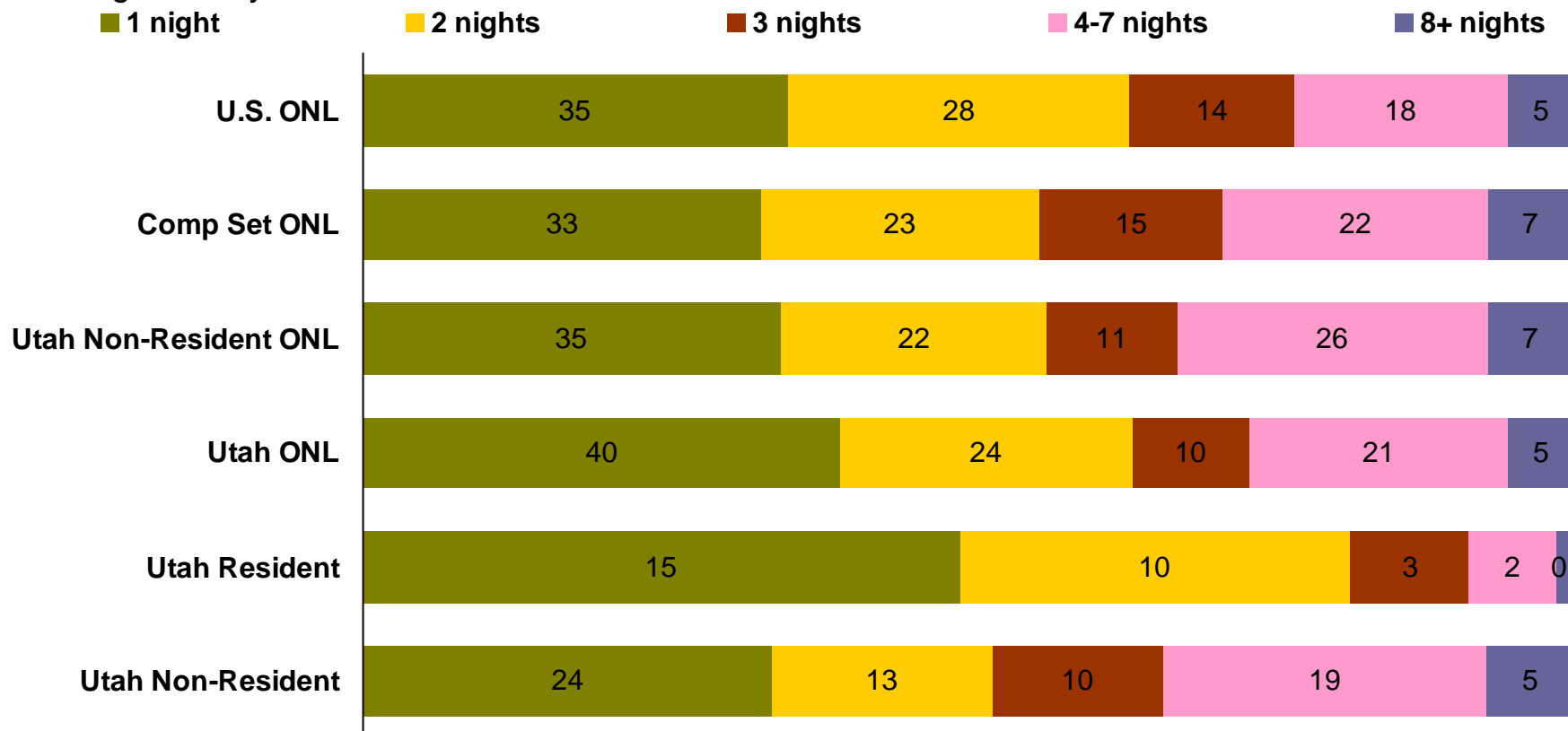
■ Trip-Dollars Based



Stay Length Distribution: U.S., Comp Set, and Utah's Travel Segments (2005/% of Stays)



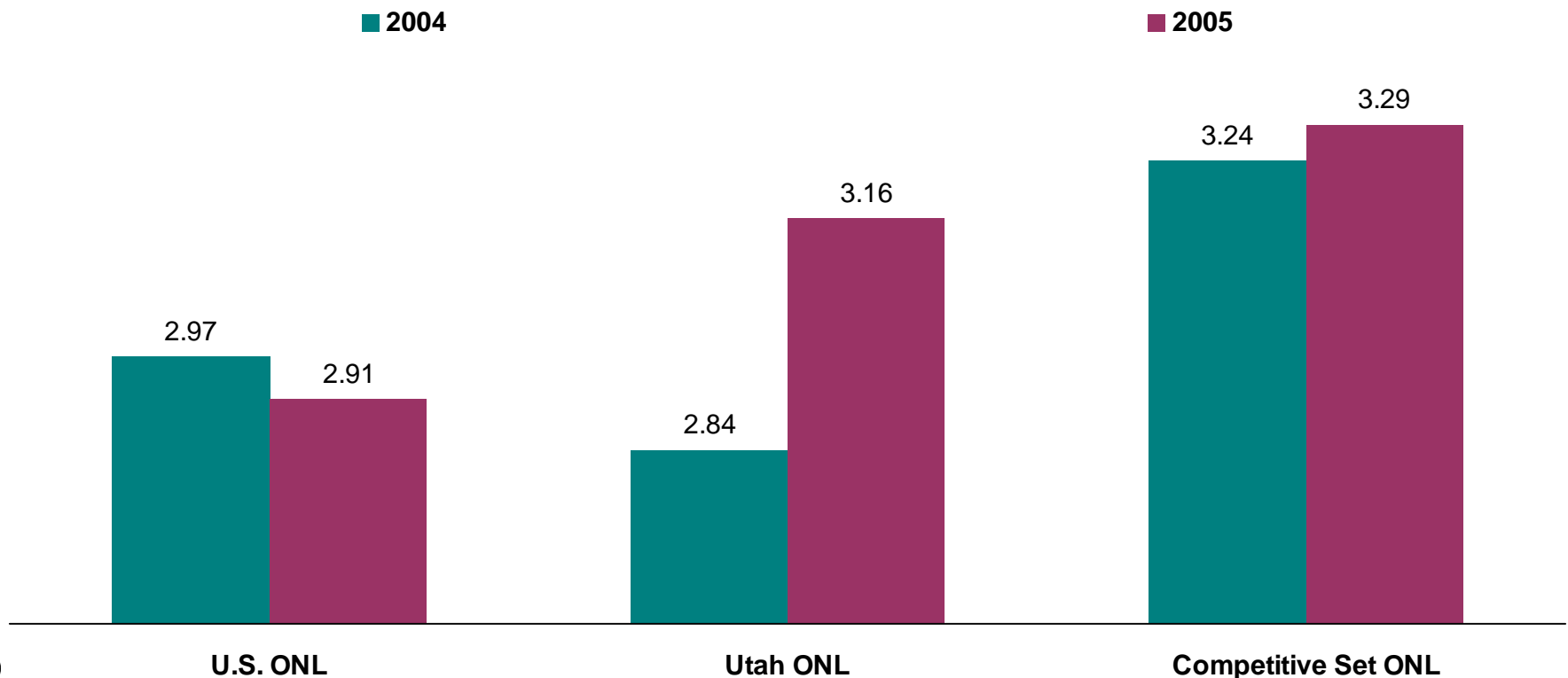
Akin to the U.S. average and comp set, the majority of Utah's travel segments stayed for only one night in 2005. Not only do overnight leisure travelers contribute the highest proportion among those who stayed one night but these 40 percent also represent the highest share in stay length distribution for that segment. Seventy percent of Utah's residents went on day trips which are not shown on this graph. Utah hosts the remaining residents at a decreasing share with an increasing length of stay in 2005.



Average Length of Stay: U.S., Comp Set, and Utah (2004 vs. 2005/% of Overnight Leisure Stays; 1+Night)



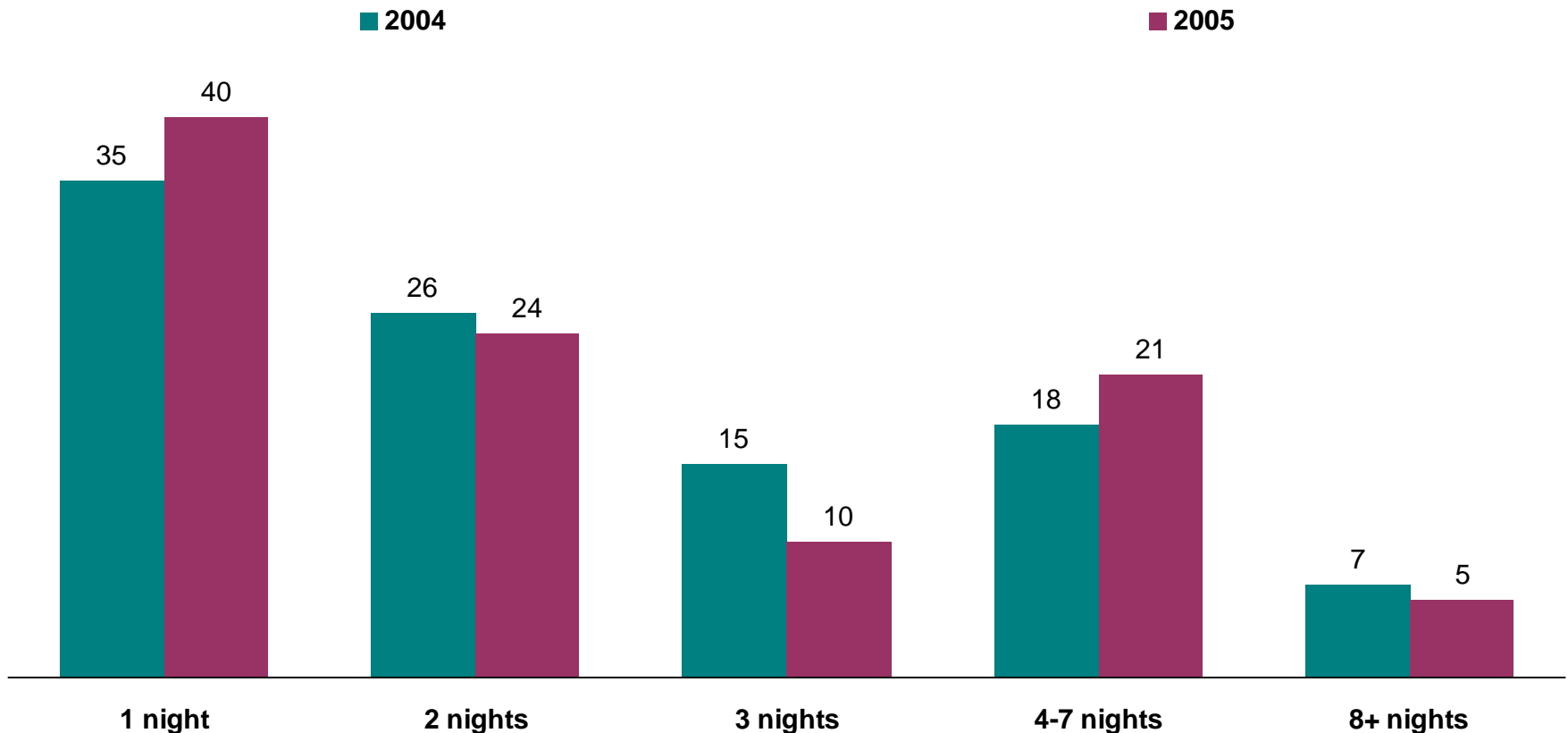
Compared to the other destinations on this graphs, Utah gained the most ground in terms of average length of stay (0.32 nights) between 2004 and 2005 and has now overcome the average at national level of 2.91 nights but still falls behind the competitive set (3.29 nights). U.S. market experienced a continuous downturn in average length of stay since 2001.



Utah Stay Length Distribution (2004 vs. 2005/% of Overnight Leisure Stays)



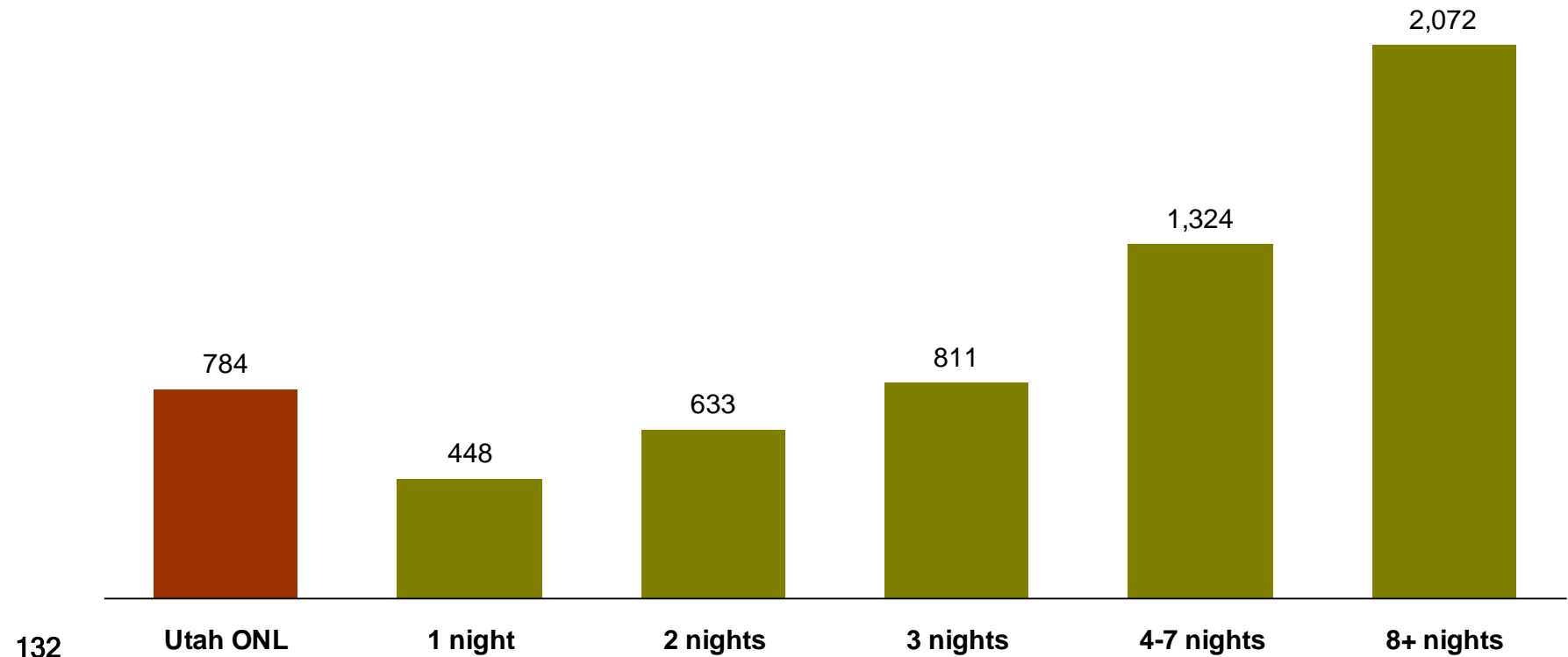
The share of overnight leisure travel parties visiting for one night increased five percentage points in 2005. Additionally, those staying 4-7 nights jumped three percentage points. In exchange, there was also a considerable five percentage point drop in those staying three nights. As the economy improves, more travelers take more shorter overnight trips.



Utah Avg. Party per Trip Spending by Stay Length (2003-2005/\$ Overnight Leisure Stays; incl. Transportation)



Naturally, the longer overnight leisure travel parties stay in Utah, the higher the average party spending per trip. Travelers staying more than two nights at their Utah destination spent a higher than average overnight leisure travel party amount per trip.



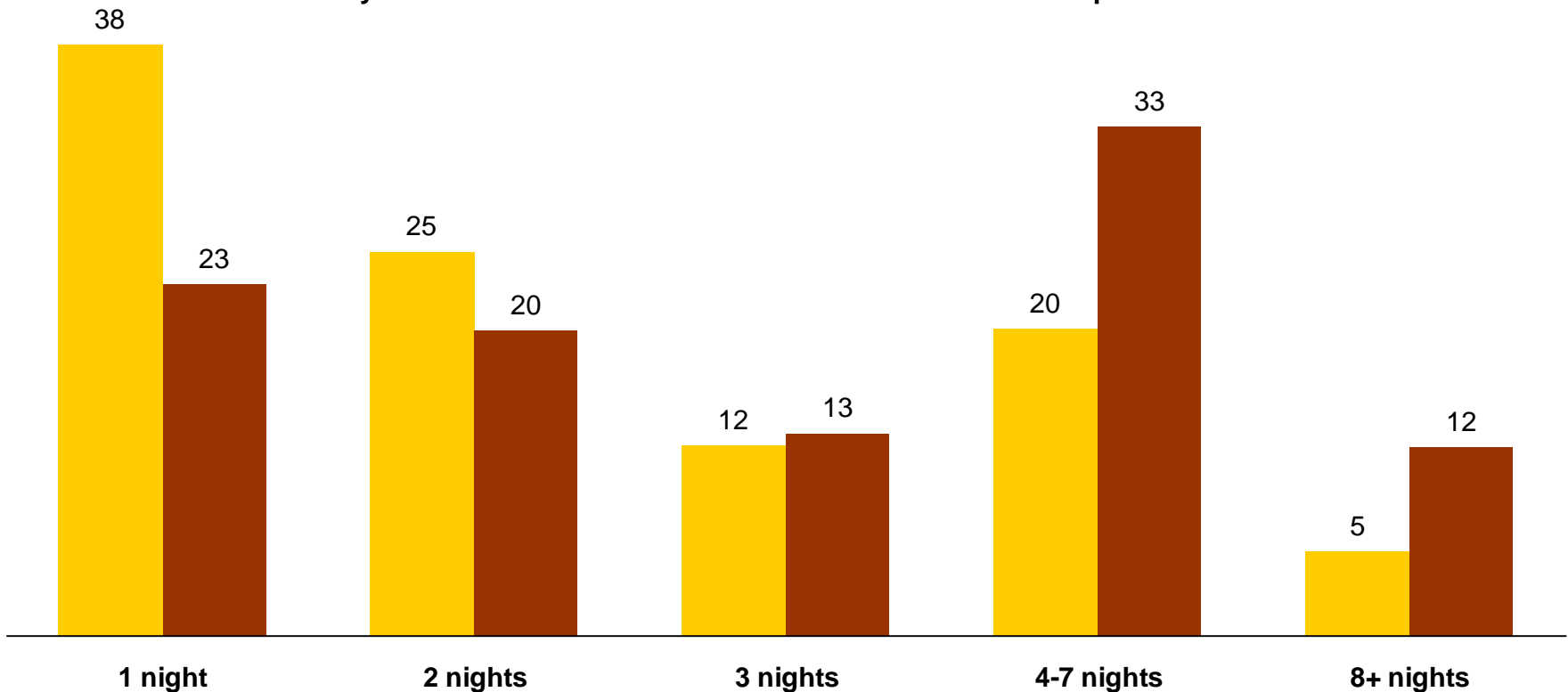
Utah Stay Length Comparison (2003-2005/% of Overnight Leisure)



On the one hand, travel parties staying in Utah for only one night generated the highest proportion of all overnight leisure travel parties (38%) while only contributing 23 percent of spending. On the other hand, those staying 4-7 nights made up one-fifth of all travel parties but generated one-third of all spending. Travelers staying longer than eight nights generated over twice the share in trip spending (12%) than in stays volume (5%). Hence, travel parties staying longer clearly generated more revenue to the State.

■ Stay Based

■ Trip-Dollars Based

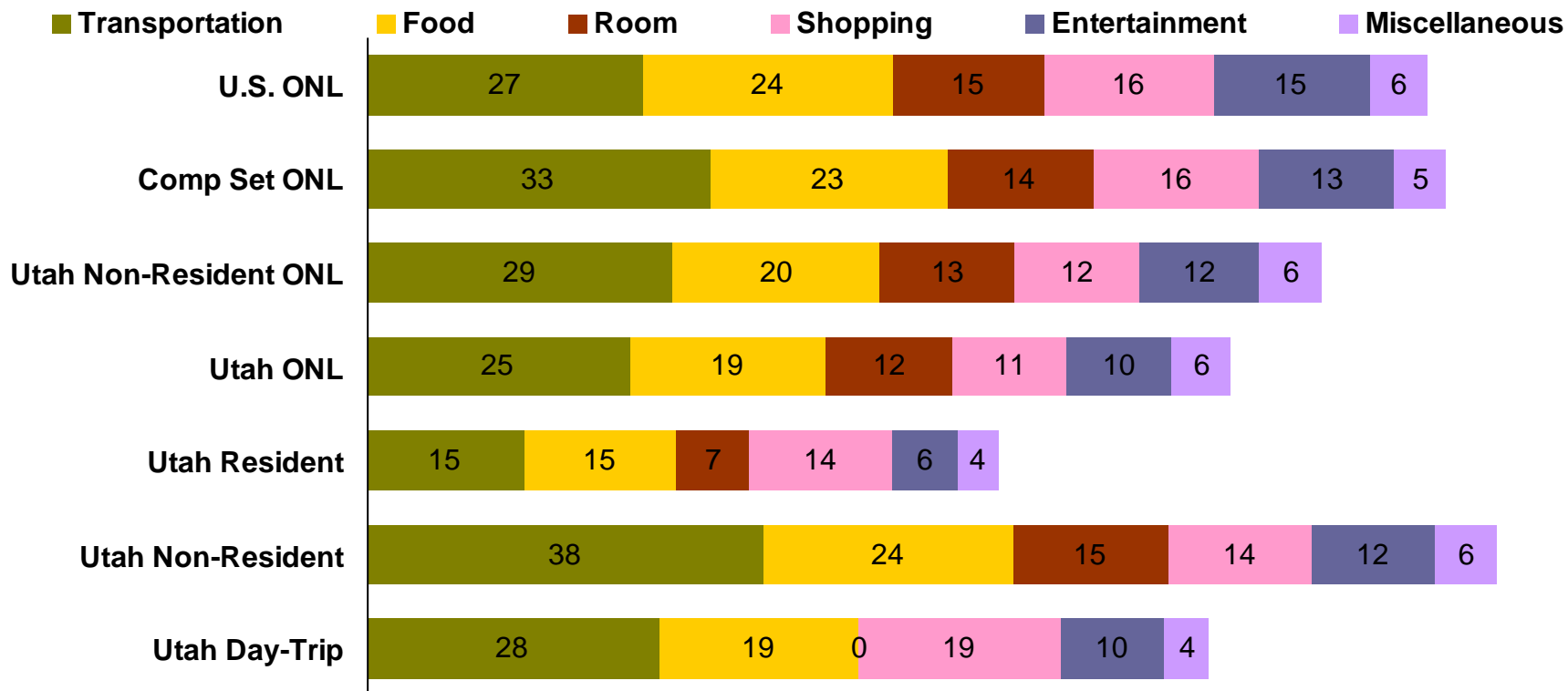


Avg. Daily Spending per Person by Spending Category: U.S., Comp Set, and Utah's Travel Segments (2005/\$ Person-Days)



Utah's average daily overnight leisure visitor spending at the destination was \$83 and is distributed across the spending categories as follows: transportation (\$25), food (\$19), room* (\$12), shopping (\$11), entertainment (\$10), and miscellaneous (\$6). Except for transportation, Utah non-resident overnight leisure and overnight leisure travelers, measured in person-days, generally spent less in all spending categories than the U.S. average whereas Utah non-residents spent more or about the same, and Utah resident spent the least in all categories.

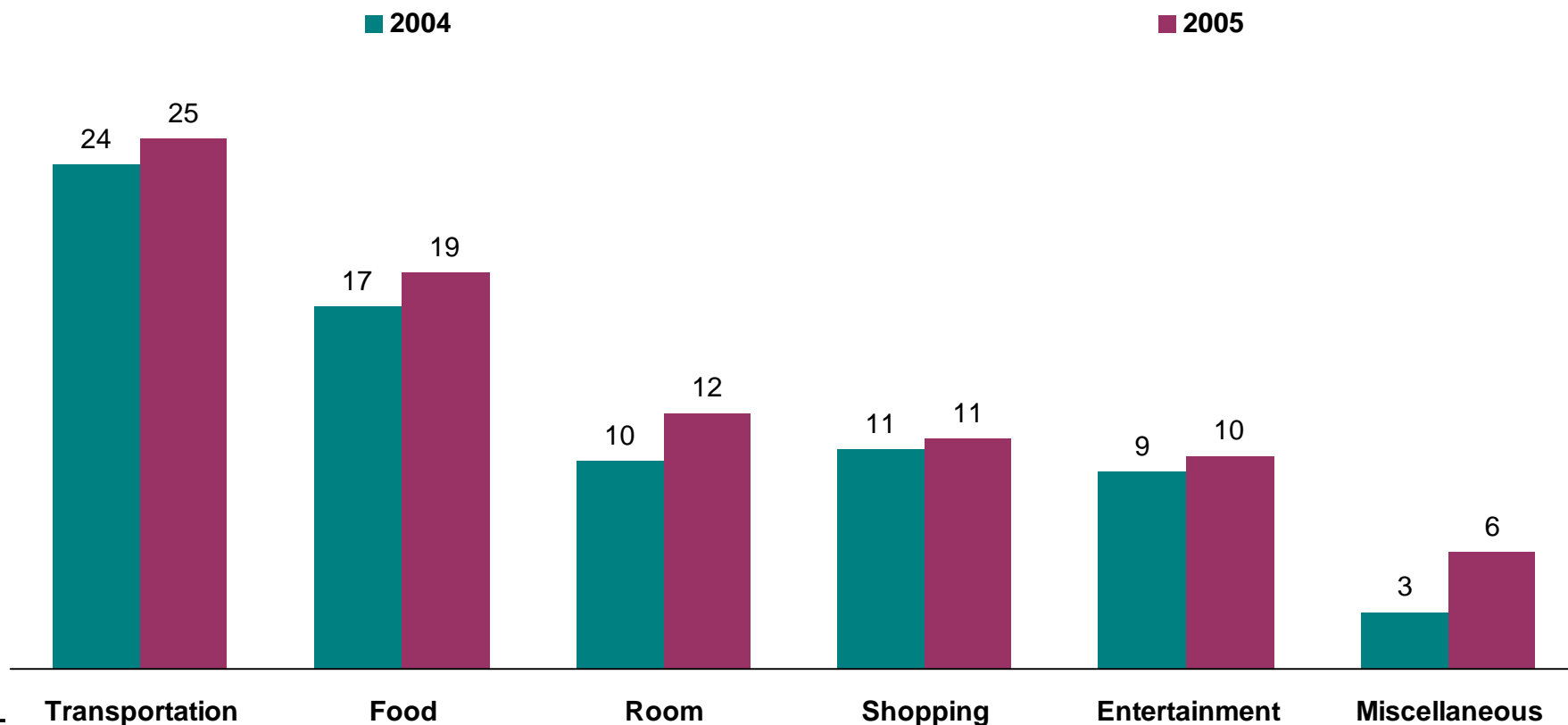
Note: Room spending includes paid and non-paid accommodations. It does not reflect average daily rates of hotels.



Avg. Daily Spending per Person by Spending Category: Utah (2004 vs. 2005/\$ of Overnight Leisure Person-Days)



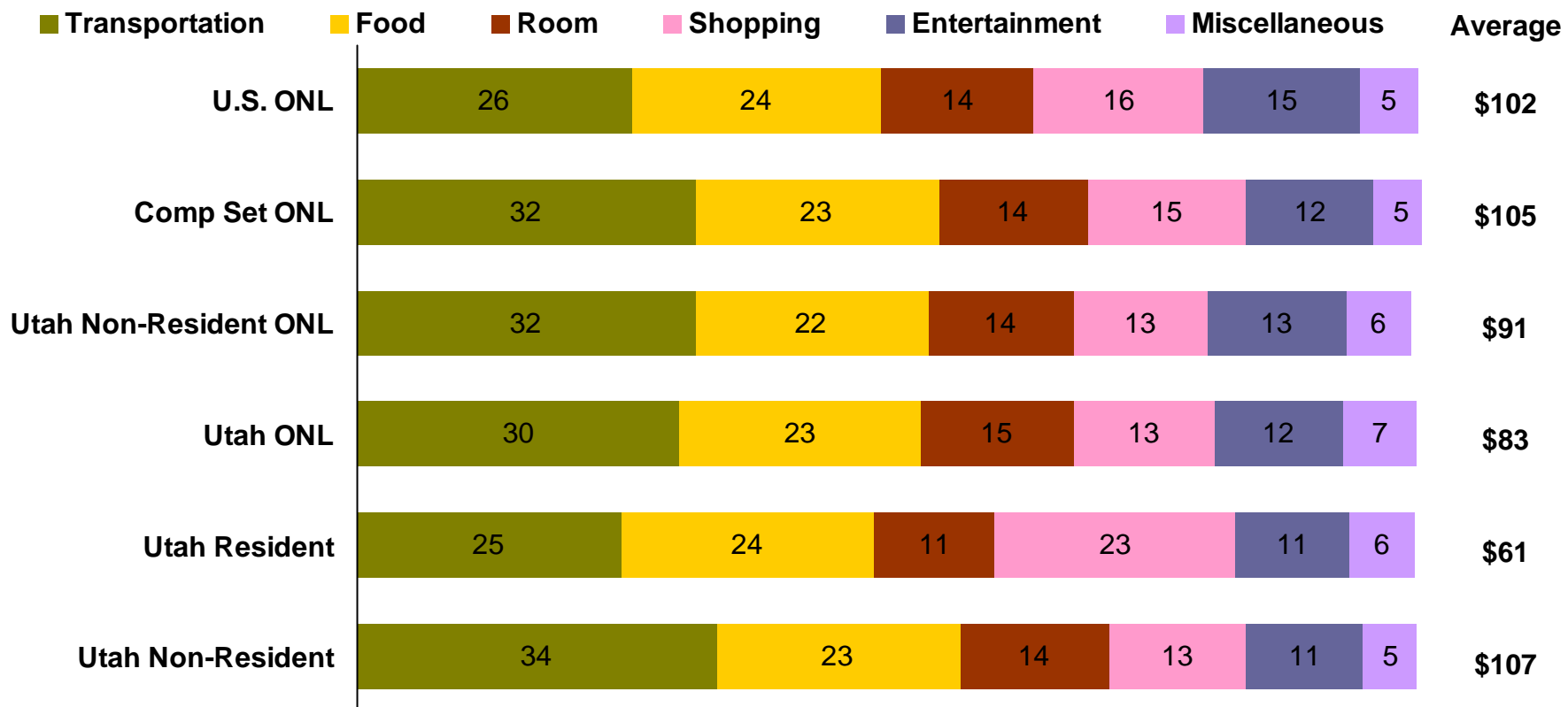
The average daily spending per person increased in all spending categories in 2005 compared to the previous year, resulting in an average daily visitor spending increase from \$74 in 2004 to \$83 in 2005.



Proportion of Daily Spending per Person by Spending Category: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Days)



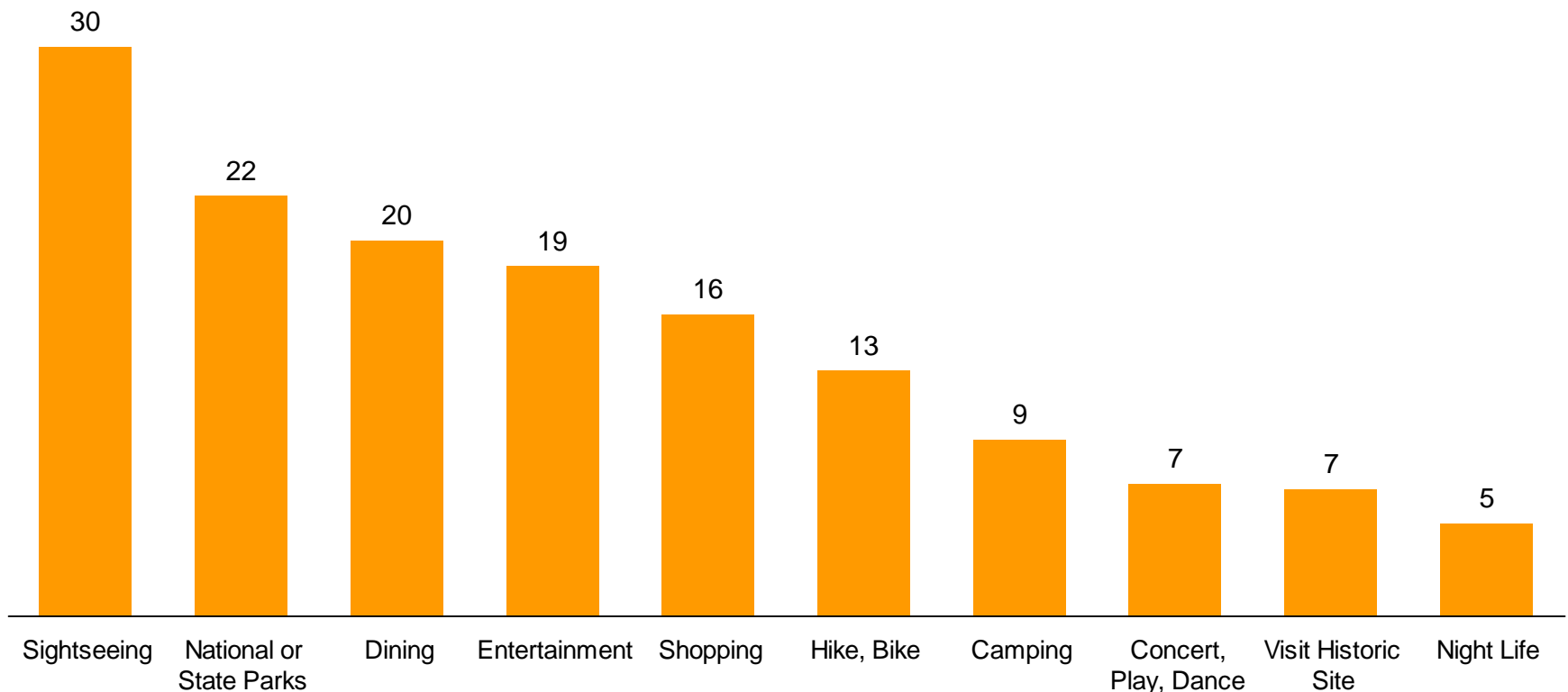
The chart below details the proportion of spending each category represents of the traveler segment spending per day. All travel segments visiting Utah except Utah non-residents spent below the U.S. average of \$102 and comp set average of \$105 per person per day. All travel segments spent a greater proportion on transportation compared to the U.S. average, except for Utah residents. Utah residents in return spent the highest proportion on shopping (23%) among all travel segments.



Utah Top Activity Participation (2005/% of Overnight Leisure Person-Stays)



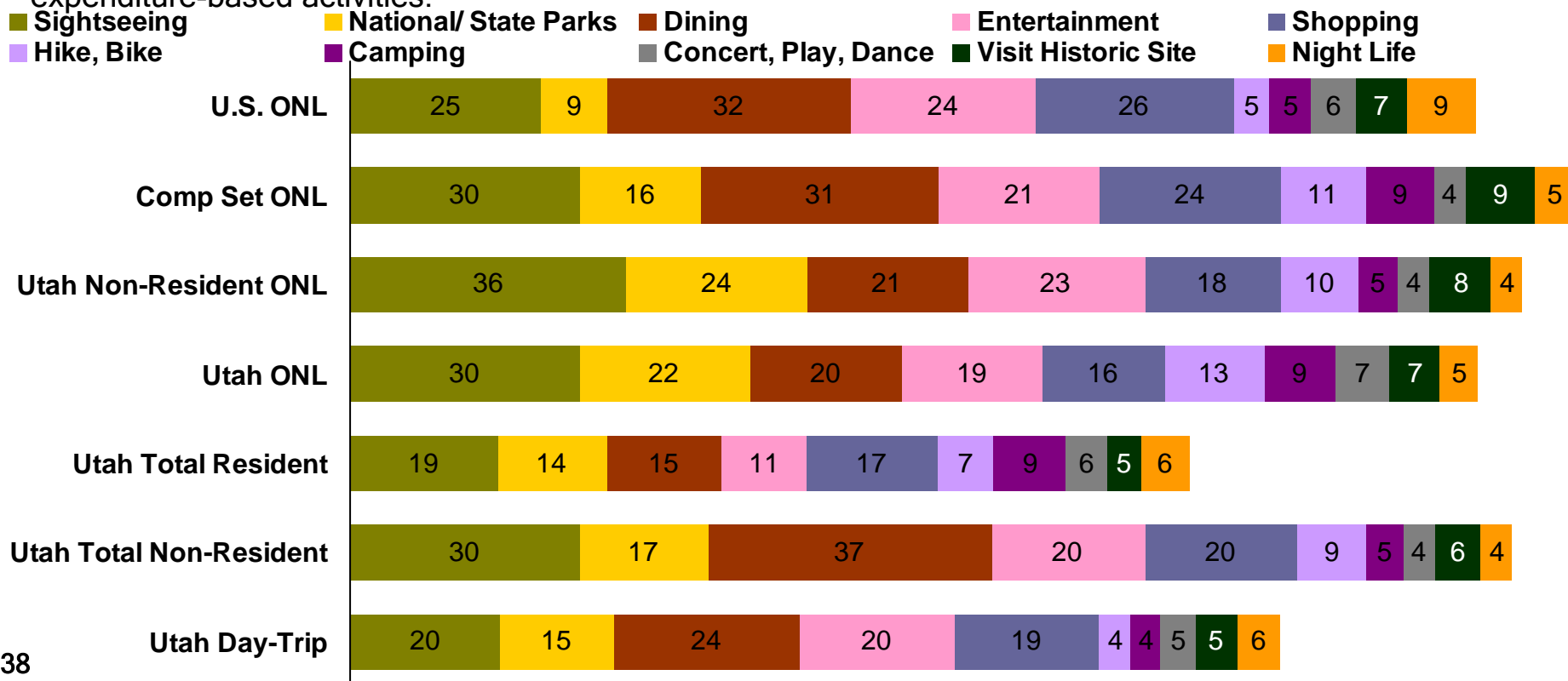
The following chart details the top ten activities overnight leisure visitors to Utah participate in. The majority of travelers enjoy Sightseeing (30%) and nature-related activities such as National or State Parks (22%), Hike/Bike (13%), Camping (9%), and expenditure-based activities such as Dining (20%), Entertainment (19%), and Shopping (16%).



Top Activity Participation: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



This chart details the top ten activities in Utah and among Utah's travel segments. By far, overnight leisure visitors to Utah are more likely to participate in the top activities sightseeing, National/State parks, Hike/ Bike, Camping, Concert/Play/Dance than overnight leisure travelers visiting U.S. destinations. Residents of the State and day-trippers alike had much lower rates of participation in the top activities. Activity participation rates of in-state travelers are higher than among out-of-state travelers for Concert/ Play/ Dance, Camping, and Night Life, and much smaller for the remaining top activities, including the expenditure-based activities.



Top Activities at the Destination (2005/% of Overnight Leisure Person-Stays)



The following two charts show activities in which visitors participated at the destination on the trip. Data are sorted in descending order by Utah visitors. Participation rates well above the U.S. averages are highlighted. Utah has participation rates well above the U.S. average in Sightseeing, National or State Parks, and Hiking and Biking.

	U.S.	Comp Set	Utah
Sightseeing	25%	30%	30%
National or State Parks	9%	16%	22%
Dining¹	32%	31%	20%
Entertainment¹	24%	21%	19%
Shopping¹	26%	24%	16%
Hike, Bike	5%	11%	13%
Camping	5%	9%	9%
Concert, Play, Dance	6%	4%	7%
Visit Historic Site	7%	9%	7%
Night Life	9%	5%	5%

Top Activities at the Destination (con't) (2005/% of Overnight Leisure Person-Stays)



The remaining activities are enjoyed by a small proportion of Utah visitors

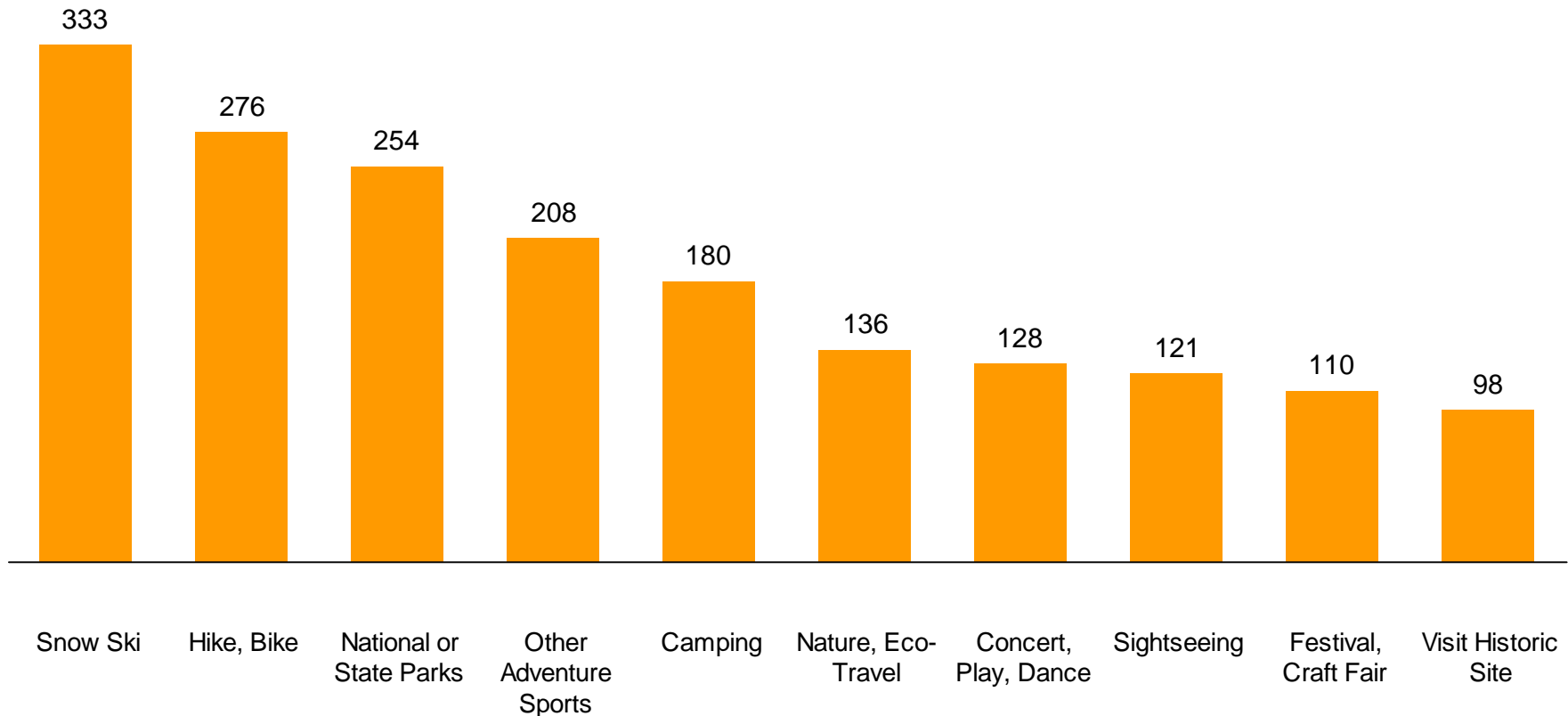
	U.S.	Comp Set	Utah
Theme Park, Amusement Park	8%	2%	5%
Nature, Eco-Travel	4%	6%	5%
Other Adventure Sports	2%	4%	5%
Festival, Craft Fair	4%	3%	5%
Snow Ski	1%	5%	4%
Watch Sports	5%	5%	4%
Museum, Art Exhibit	6%	6%	4%
Group Tour	4%	3%	3%
Hunt, Fish	4%	4%	3%
Golf	3%	3%	2%
Beach, Waterfront	11%	2%	1%
Boat, Sail	2%	2%	1%
Gamble	8%	4%	0%
Shows (auto, boat, antique, etc.)	1%	1%	0%

Utah Activity Index

(U.S. Participation Level = 100)
(2005/ Overnight Leisure Person-Stays)



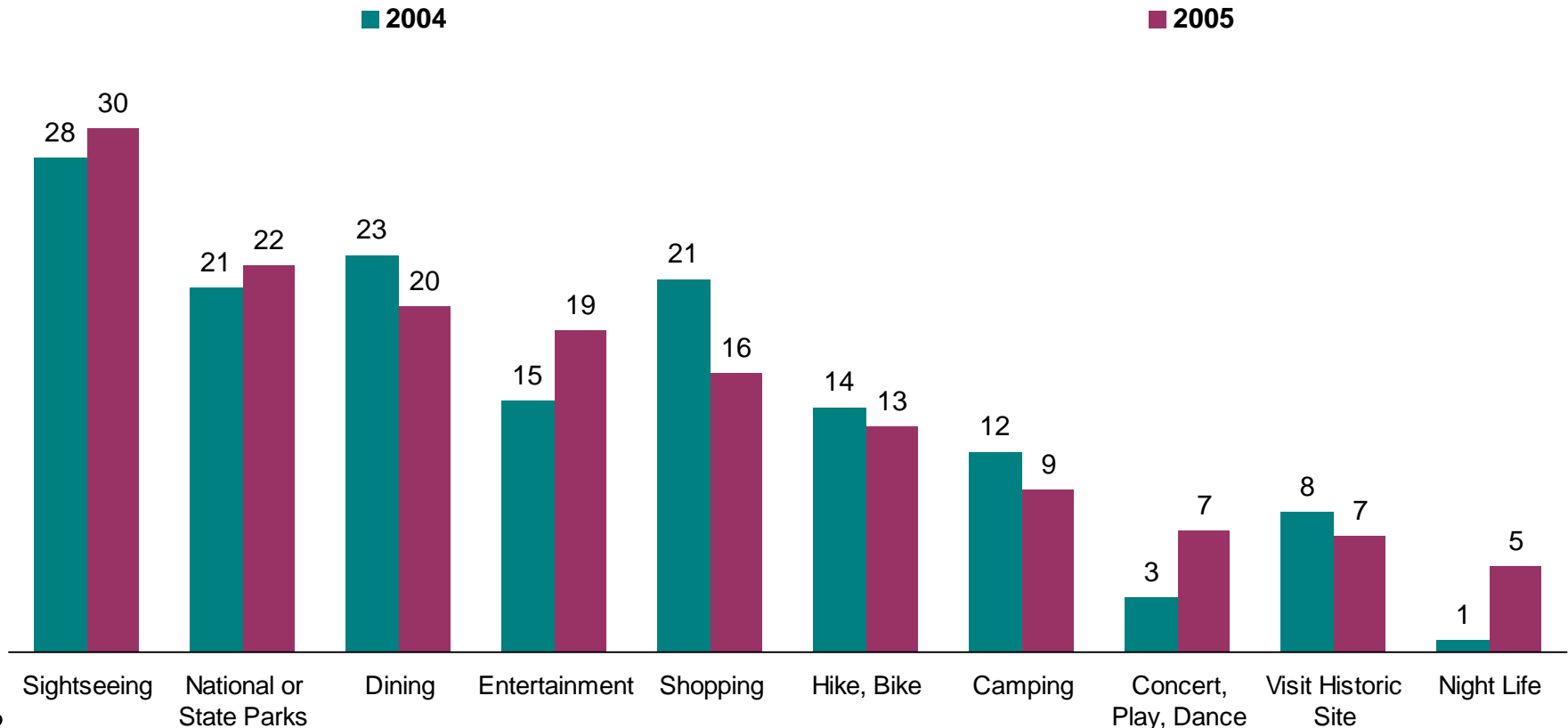
The activity index uses the U.S. to determine the average of 100 and anything above is an activity that travelers in Utah are more likely to do than visitors to the U.S. The Index is different from the share of participation in that it only reflects a traveler's propensity to participate in an activity, relative to the propensity for competing destinations. Therefore, Utah can position itself as a destination for: sports, natural, as well as cultural-based activities.



Utah Top Activity Participation (2004 vs. 2005/% of Overnight Leisure Person-Stays)



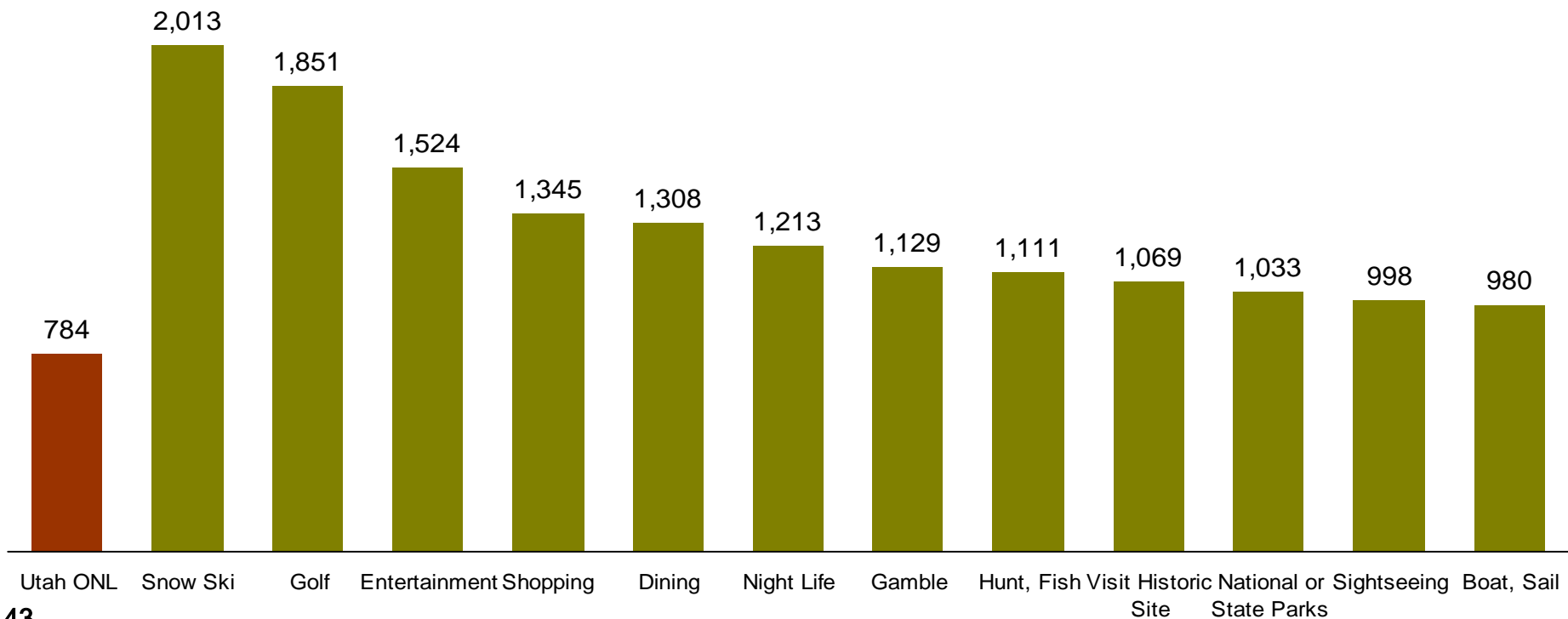
The chart below details the change in activity participation among overnight leisure travelers to Utah between 2004 and 2005. There were shifts in participation away from e.g. Dining (down three percentage points), shopping (down five percentage points) with increases in Sighseeing (up two percentage points), Entertainment, Concert/Play/Dance, and Night Life (each up four percentage points).



Utah Avg. Party per Trip Spending by Activities (2003-2005/\$ Overnight Leisure Stays)



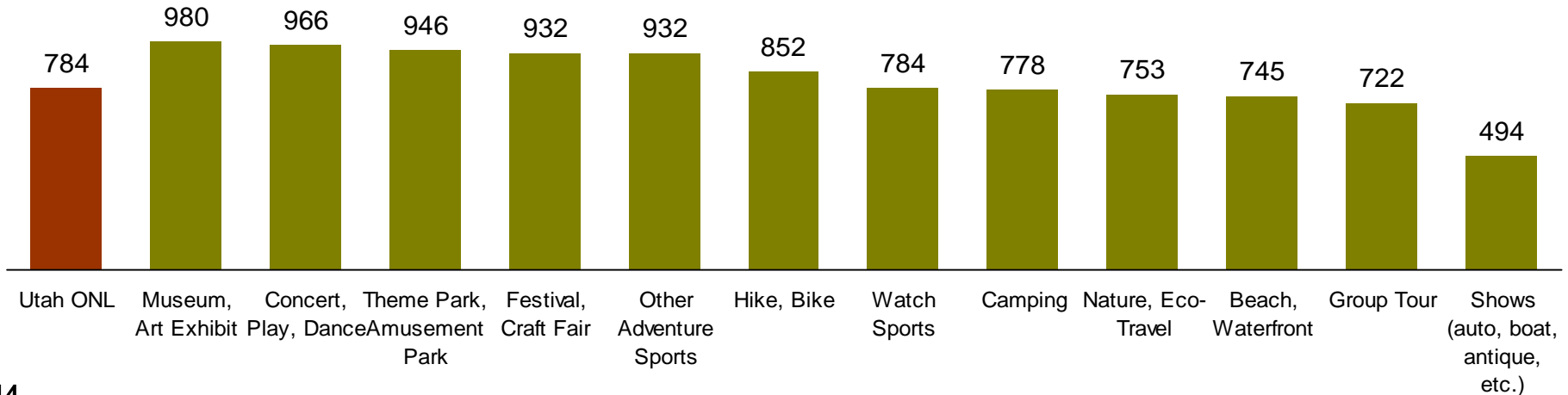
Each activity group depicted in the graph below spent higher than average amounts per party per trip when compared to the average Utah travel party spending level during 2003 through 2005.



Utah Avg. Party per Trip Spending by Activities (con't) (2003-2005/\$ Overnight Leisure Stays)



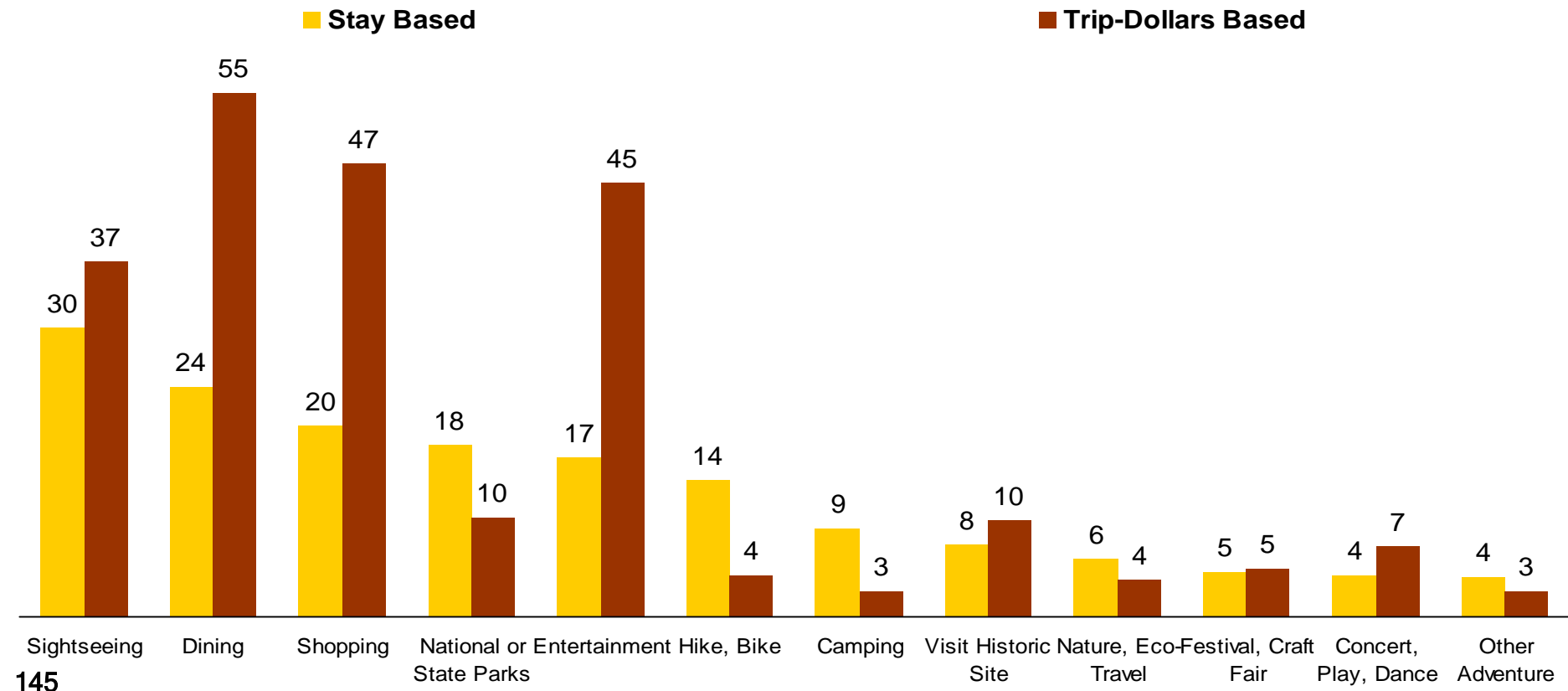
Among Utah's top activity participation rates, overnight leisure travelers going camping, nature/eco-travel, beach/waterfront, group tour, and shows are the only visitors spending less than the average per trip.



Utah Activity Comparison (2003-2005/% of Overnight Leisure)



Among Utah's overnight leisure travel parties, those that participated in Utah's top five activities, with the exception of National or State Parks, represented far higher shares of trip-dollars than travel parties shares, thereby indicating the monetary importance of these individual travel parties.



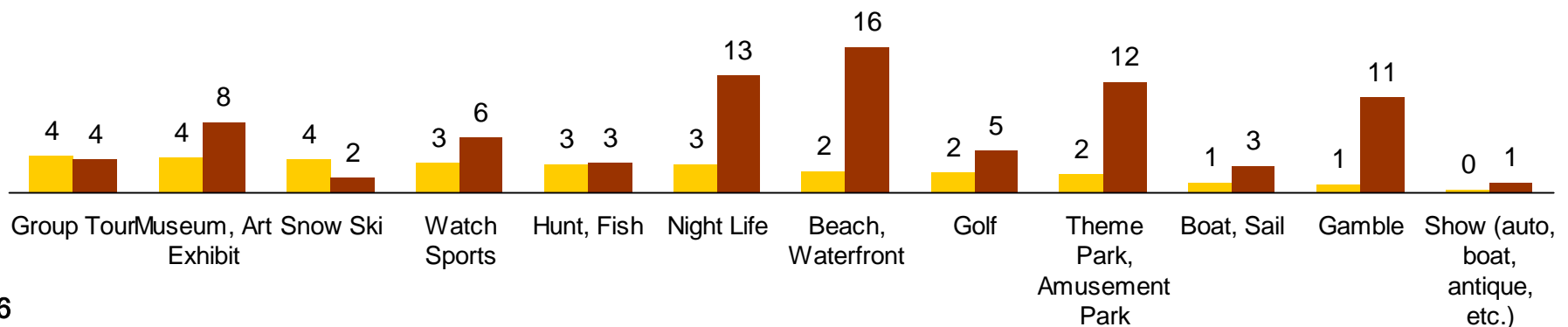
Utah Activity Comparison (2003-2005/% of Overnight Leisure)



Utah's overnight leisure travelers participating in the top nature-based activities, such as National and State Parks, Hike/Bike, and Camping contributed considerably less in trip-dollars volume than they represent in share in travel party volume.

■ Stay Based

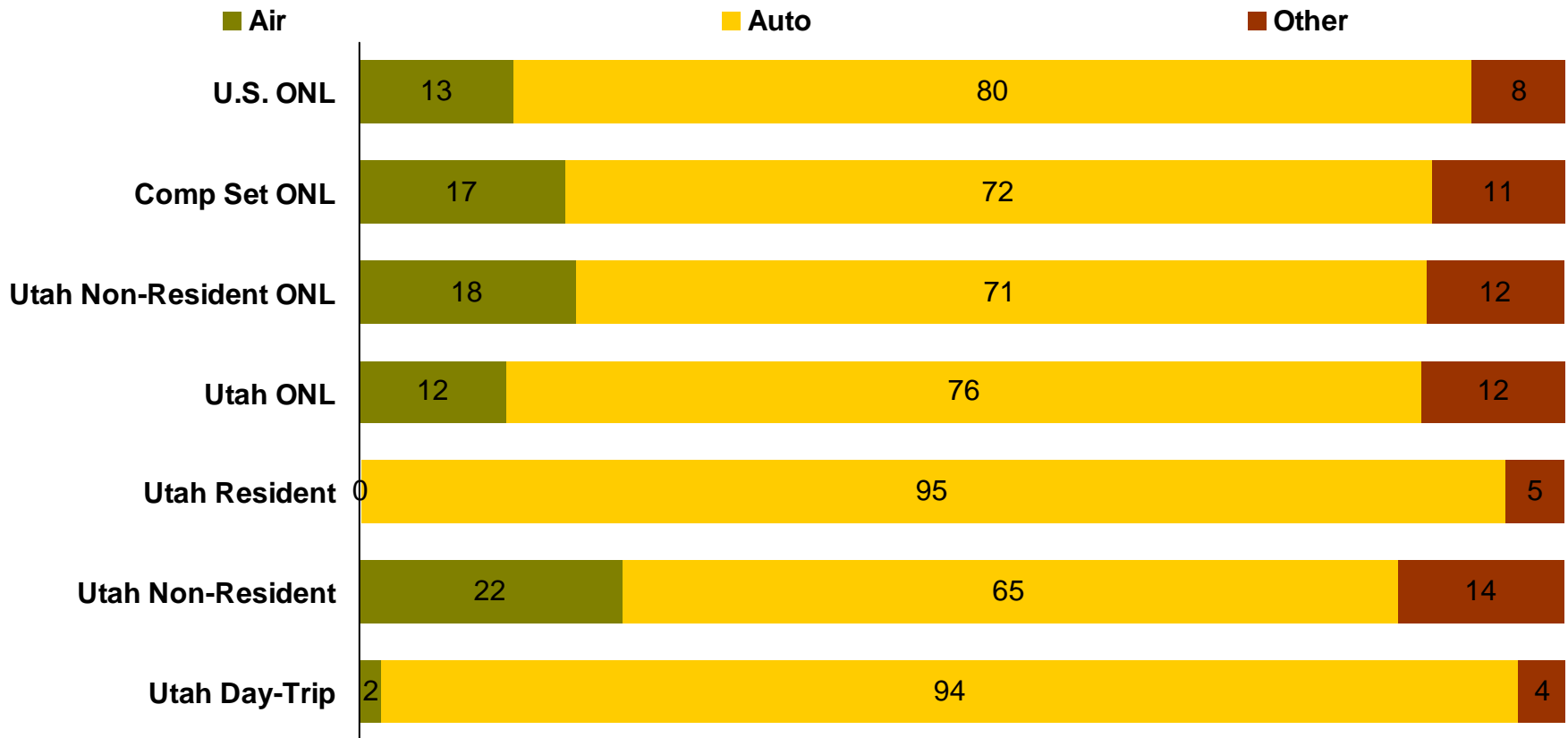
■ Trip-Dollars Based



Main Mode of Transportation: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



In 2005, Utah relies heavily on overnight leisure visitors arriving to the area by auto (car/van/small trucks) (76%). Compared to the U.S., Utah's day trippers and residents had much higher shares of auto travel, 94% and 95%, respectively. A smaller share of Non-Resident overnight leisure visitors (71%) traveled by auto to Utah. Fifteen percent of overnight leisure Non-resident flew into Utah, compared to only 13% flying to the average U.S. destination.



Utah Main Mode of Transportation (2004 vs. 2005/% of Overnight Leisure Person-Stays)

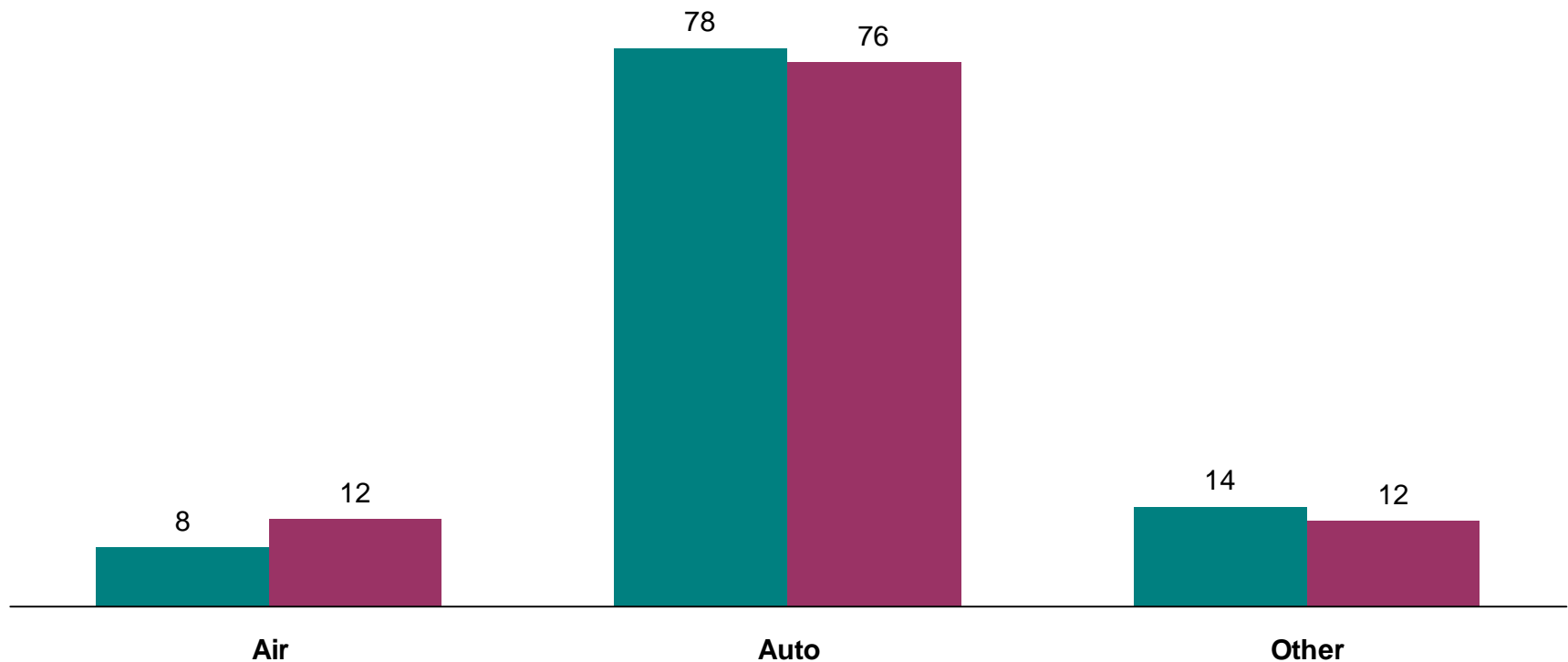


There was some change in the transportation mode that overnight leisure travelers to Utah selected in 2005. The share of those traveling by air jumped four percentage points to 12 percent in 2005 while there were small two percentage point decreases in the proportion of visitors traveling by car and other means.

Note: Other includes RV, train, bus, large truck, and other miscellaneous transportation modes.

■ 2004

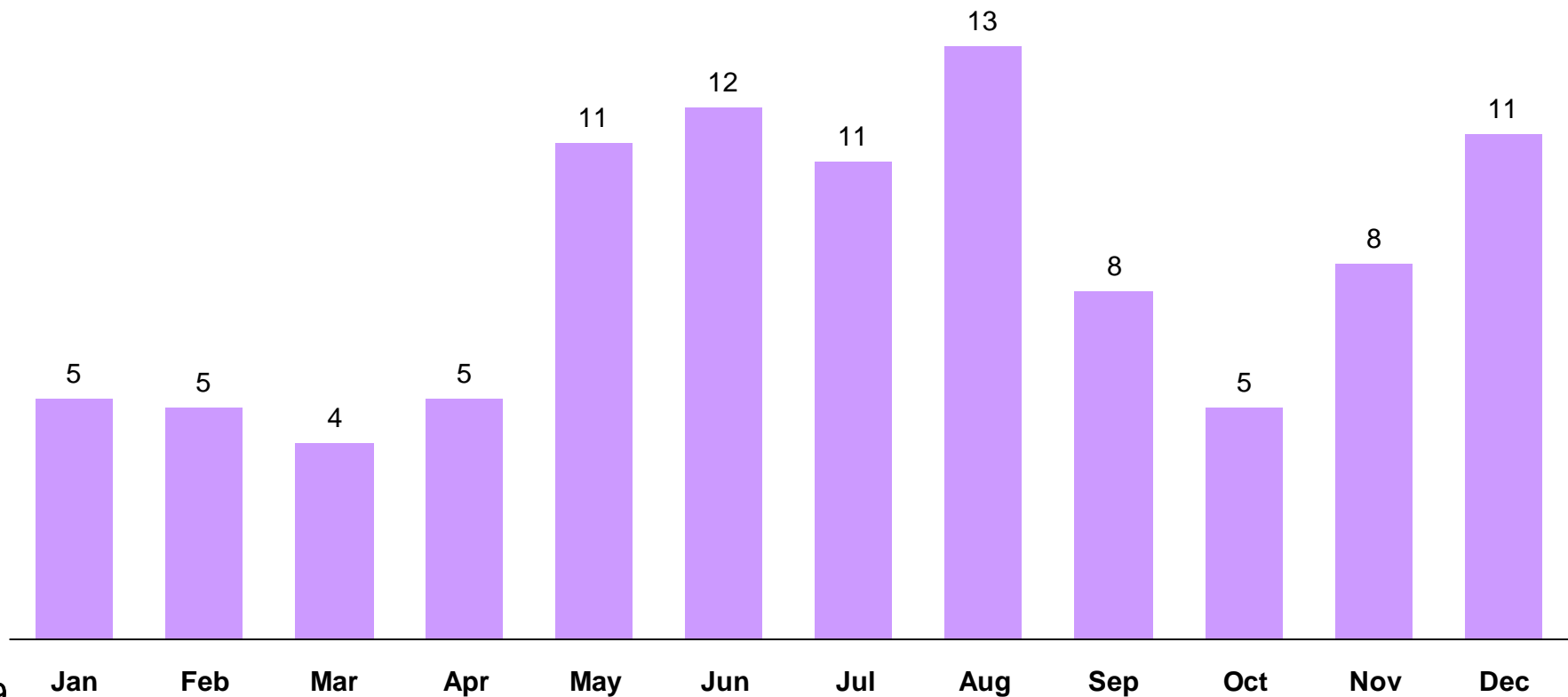
■ 2005



Utah Month Trip Started (2005/% of Overnight Leisure Person-Stays)



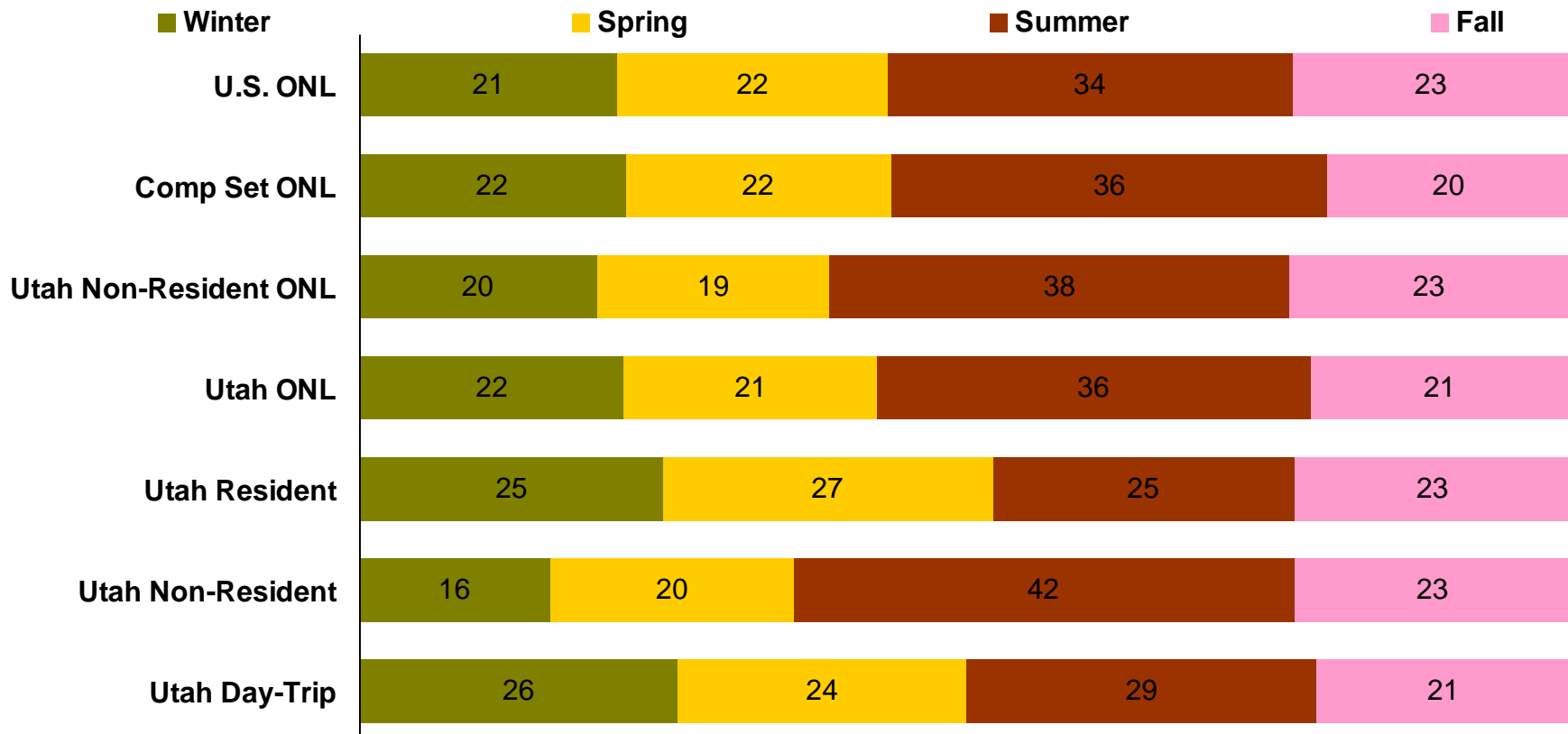
The most popular travel month in 2005 was August (13%), followed by June (12%). Utah welcomed 11 percent of its travelers in each of the following months: December, May, and July.



Trip Timing by Season: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



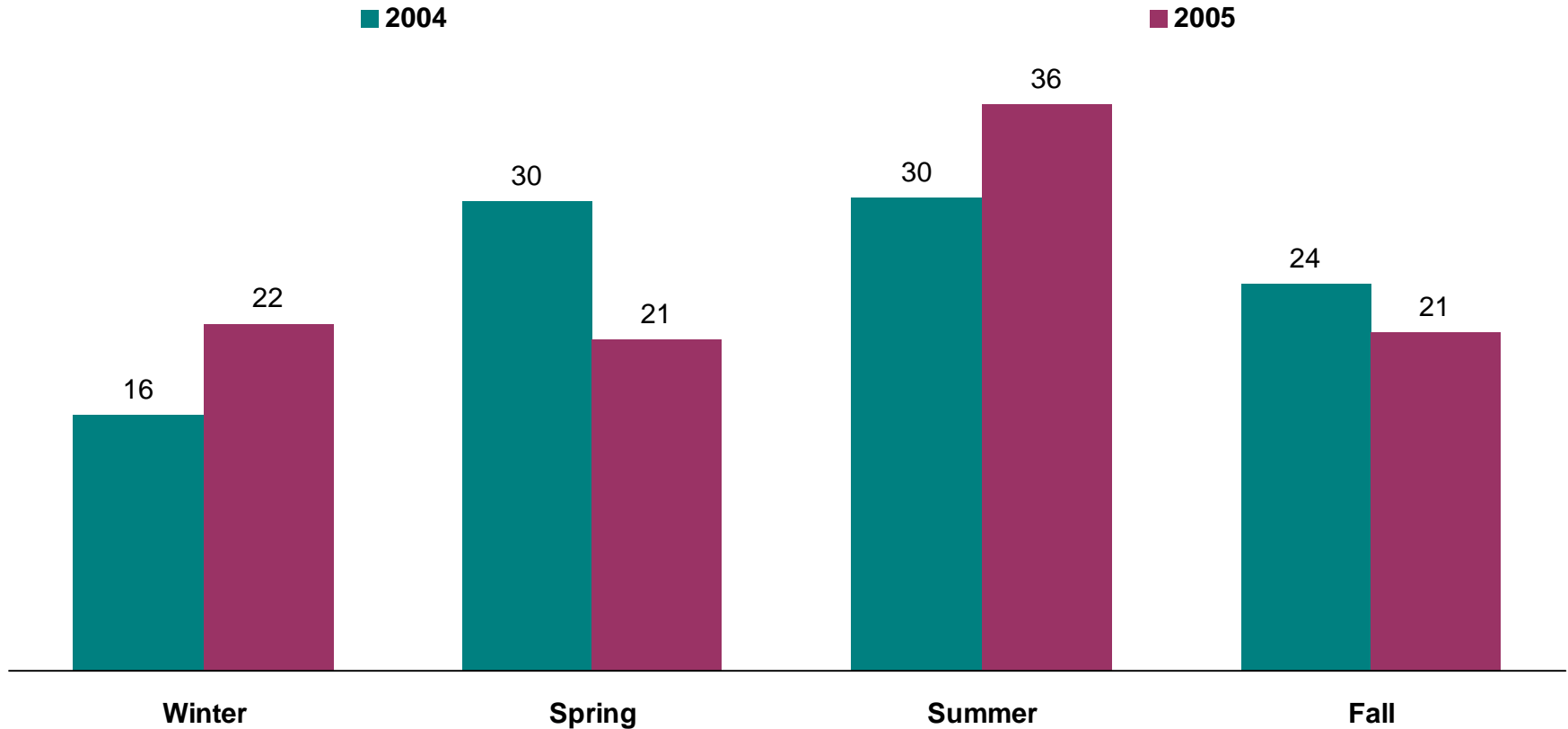
Summer was by far the most popular travel month for U.S., the comp set and all of Utah's travel segment travelers, except Utah residents. Thirty-eight percent of overnight leisure non-residents traveled to the State during that season. The distribution among Utah resident and day-trippers were very fairly similar and consistently distributed across all four seasons.



Utah Trip Timing by Season (2004 vs. 2005/% of Overnight Leisure Person-Stays)



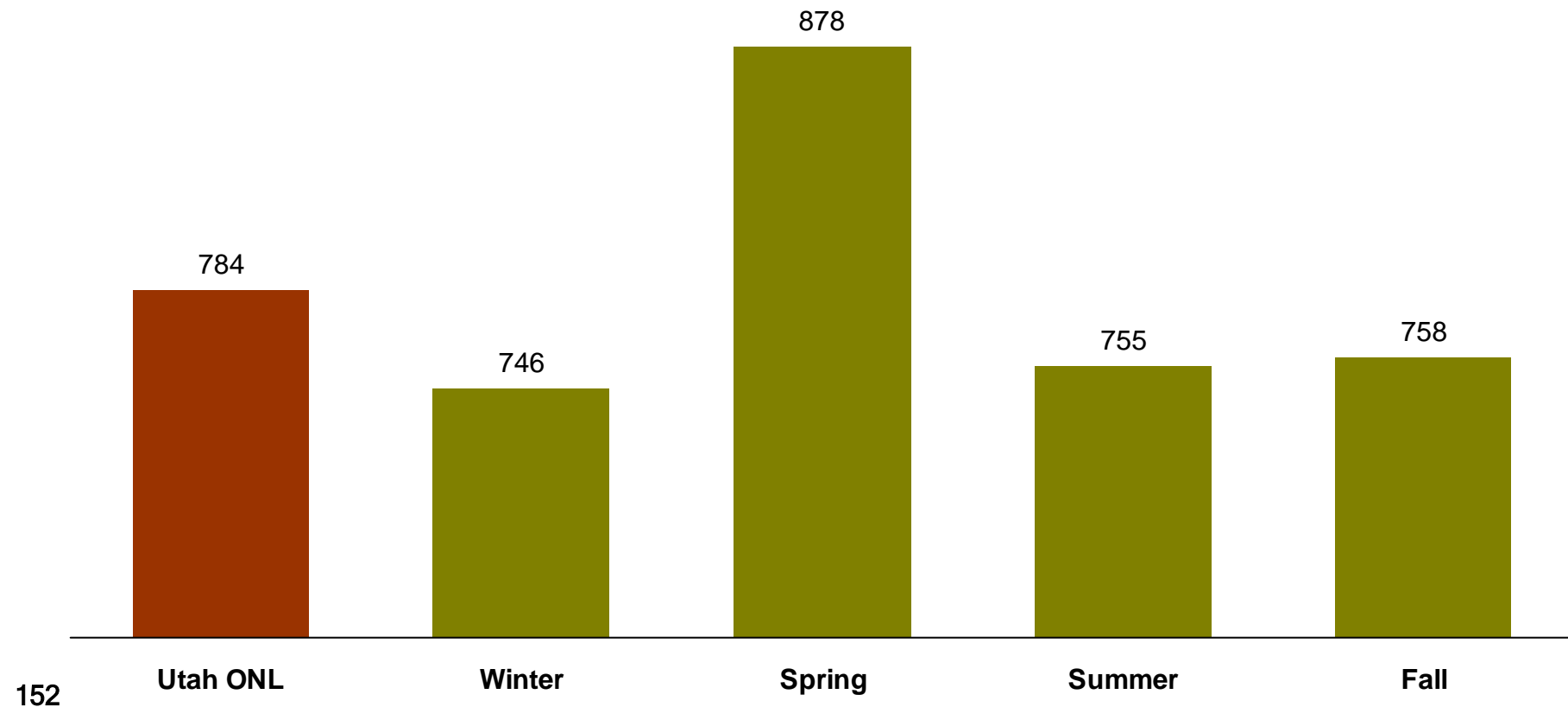
The chart below reveals shifts in seasonal travel away from spring and fall in 2004 into the winter and summer in 2005. Utah experienced growth in the share of visitors in 2005 traveling in the Summer and Winter, jumping six percentage points each. Summer and spring of overnight leisure travelers in Utah hosted similar shares in 2005 as of in 2003.



Utah Avg. Party per Trip Spending by Season (2003-2005/\$ Overnight Leisure Stays)



Even though, Utah Overnight Leisure visitation is highest in summer, average travel party spend the highest on their trip to Utah in spring during 2003 through 2005. Travelers visiting during the winter, summer, and fall seasons spent less than average. However, average spending increased in all seasons from 2000-2002 to 2003-2005 but in the winter season.



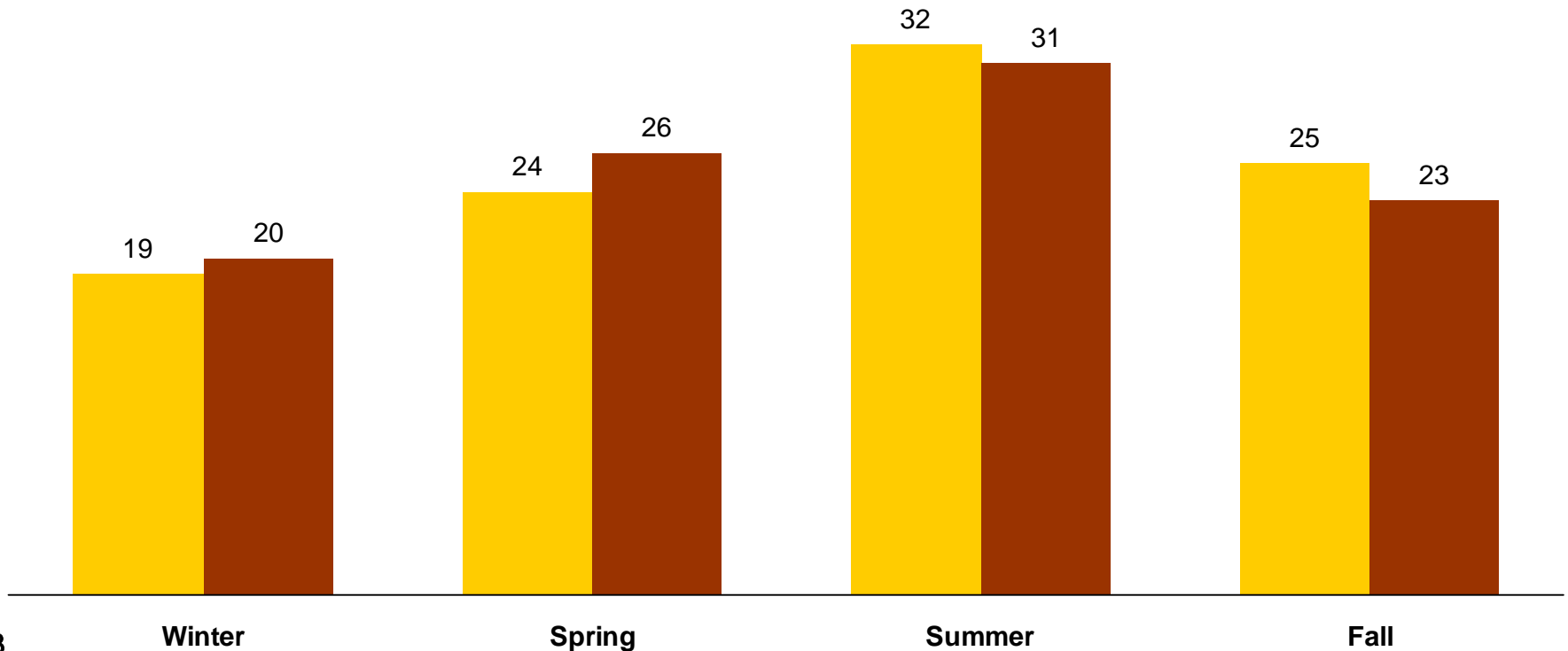
Utah Trip Timing Comparison by Season (2003-2005/% of Overnight Leisure)



The share of overnight leisure travel parties account for similar shares of trip-dollars in all seasons with summer generating the highest shares in both measure and winter generating the lowest shares.

■ Stay Based

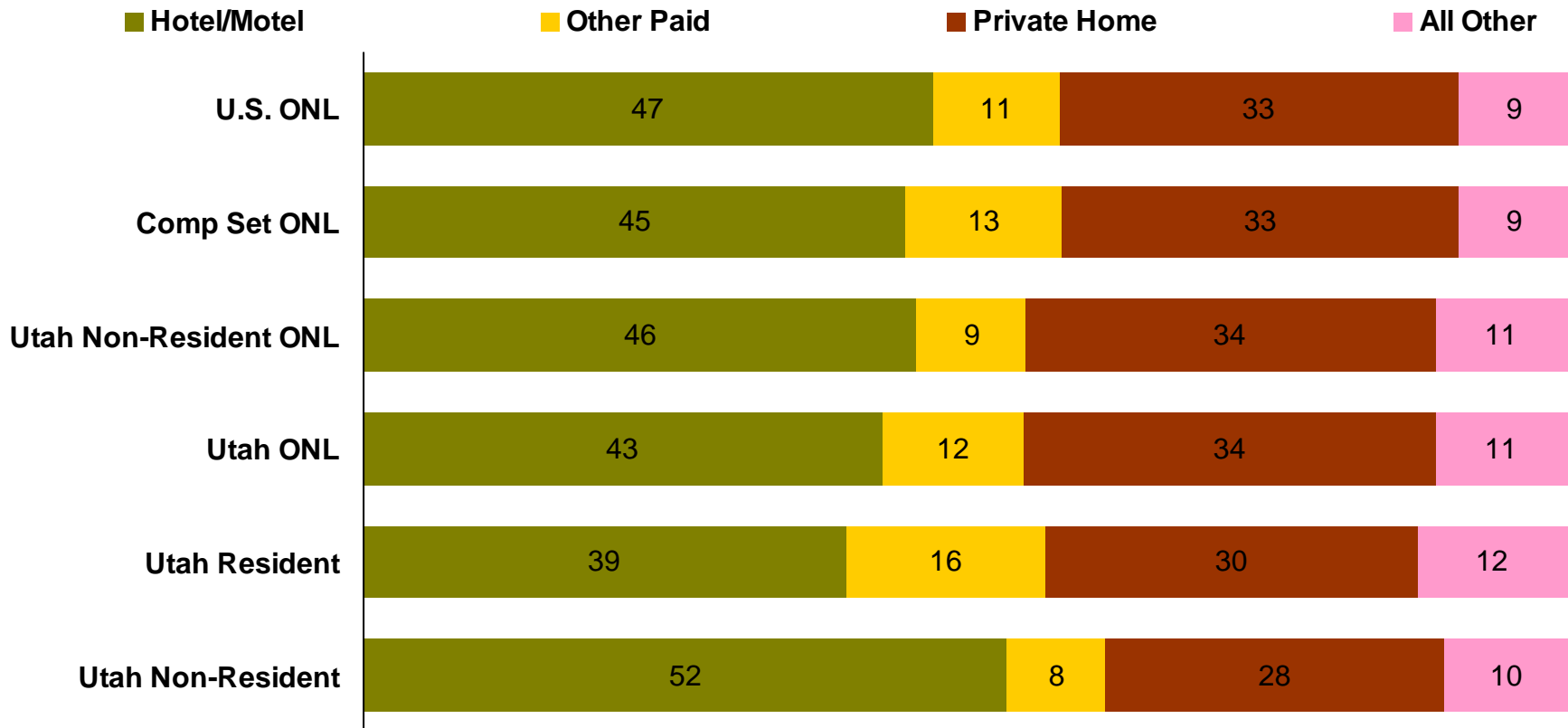
■ Trip-Dollar Based



Accommodations Type: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



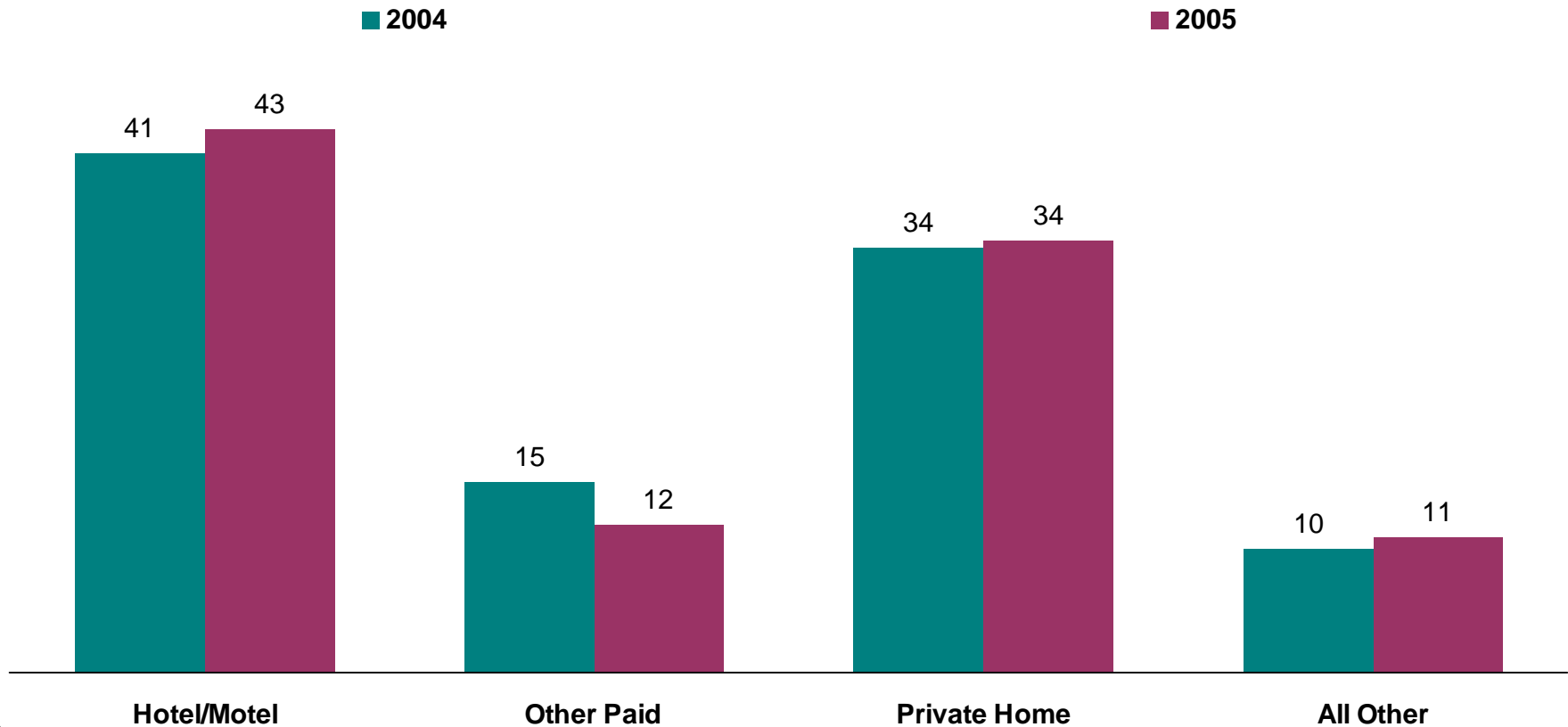
The greatest proportion of Utah's overnight leisure non-resident visitors stay in Hotel/motel (46%). Most of the remaining visitors stay in private homes (34%). Utah's proportions are fairly similar to the U.S., the comp set, and Utah's other travel segments. Over half of out of state travelers stayed in Utah's hotels or motels during 2005 (52%). Conversely, only 39 percent of Utah residents stayed in hotels and motels. This is due to their higher propensity to stay in private homes (33%) and other paid accommodations (16%) compared to their non-resident counterparts.



Utah Accommodations Type (2004 vs. 2005/% of Overnight Leisure Person-Stays)



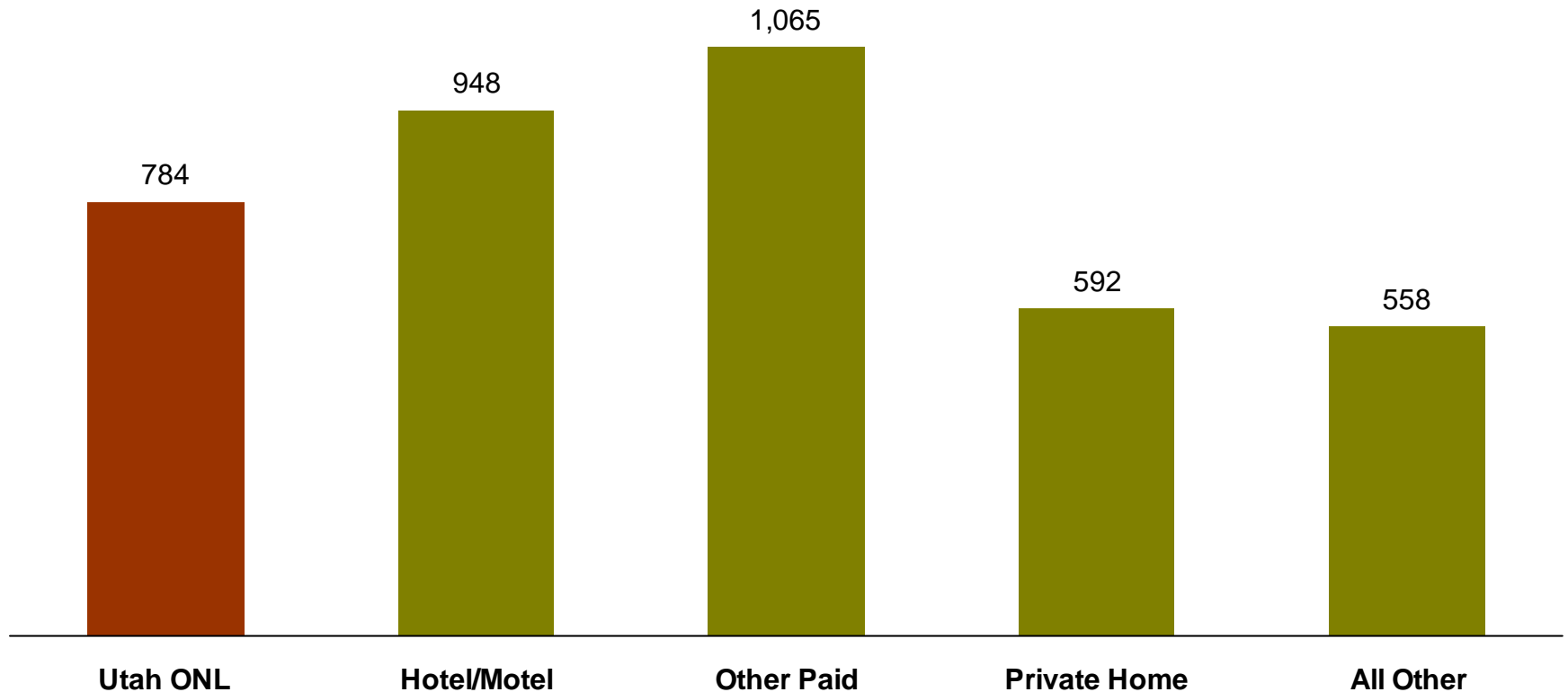
Between 2004 and 2005, overnight leisure travelers to Utah opted for similar accommodation types. There was a slight increase of visitors staying in hotels/motels and all other non-paid accommodations balancing out the three percentage point decrease in other paid accommodations.



Avg. Party per Trip Spending by Accommodations Type: Utah (2003-2005/\$ Overnight Leisure Stays)



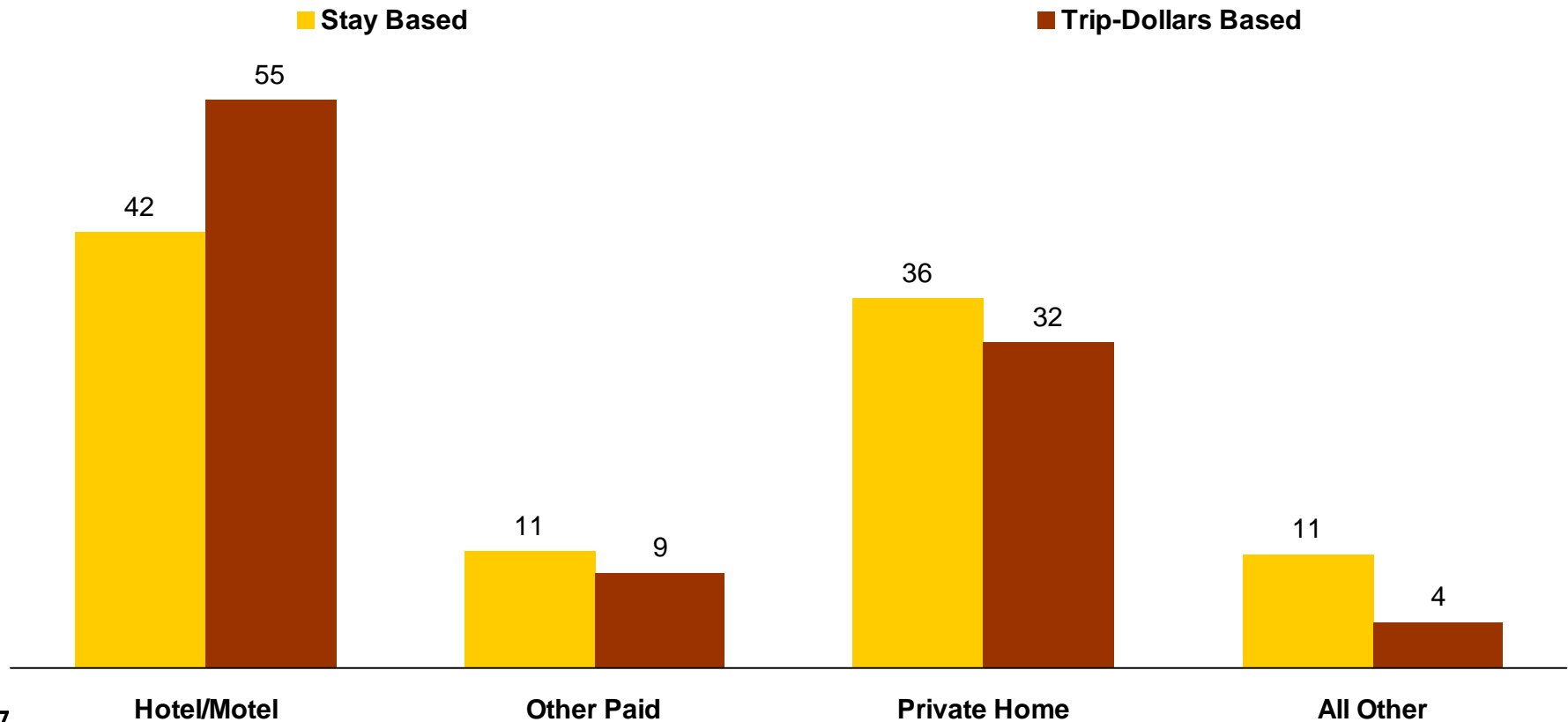
Those overnight leisure travel parties in other paid accommodations clearly surpassed Utah's average spending of \$784 as they spent an average of \$1,065 per trip. This was followed by travelers choosing to stay in hotels/motels (\$948). Visitors staying in private homes and all other accommodations spent considerably less than average.



Utah Accommodations Type Comparison (2003-2005/% of Overnight Leisure)



Naturally, overnight leisure travelers to Utah that stayed in hotel/motels accounted for a much higher share of spending (55%) than share of travel parties (42%), making this group valuable to the State on a monetary basis. All the other travel segments accounted for fewer spending shares relative to their weight in travel parties.





- This study evaluates additional characteristics about Utah travel that will help marketers to better position Utah in the marketplace based on the State's unique travel features as well as where it competes well against the competition.

Purpose of Stay

- The majority of overnight leisure travelers visited to see friends and relatives (34%). While this is a primary purpose of stay at the U.S. Level, Utah hosts a smaller share in the local market (29%). Special event travel accounted for 27% of all day-trippers purpose of stay. Far fewer shares of visitors traveled to Utah for getaway weekends compared to the U.S. average. A quarter of Utah residents traveled for other personal reasons.
- Aside from VFR travel, another top purpose of stay in Utah is a general vacation, representing 22% of the overnight leisure market. This type of visit is most commonly enjoyed by non-resident visitors to Utah.
- Even though, travelers visiting Friends and Relatives account for the highest share in terms of the size of the overnight leisure market in Utah (38%), they only contribute 33 percent of spending. General vacationers, on the other hand, have the highest average party trip spending at \$1,087 compared to an average of \$784. Also, this segment accounts for a higher share of spending (29%) when compared to it's overall share of volume (23%), making general vacationer travelers most valueable to the State.



Party Composition

- Utah attracted travel parties with the highest average party size of all its competitors (2.98 persons), a slight decrease from 3.04 persons in 2004, as it welcomed the smallest share of adults traveling alone (16%) but the largest shares of families (36%) and couples (38%), this is even after a four percent point increase in adults traveling alone and a considerable ten percentage point drop in family travel. Large travel parties comprised of three or more adults spent the most on average (\$1,668), leading spending by families (\$800) by a wide margin.

Note: Small differences in average party size produce large differences in total Person-Stays (travelers) because of the large Stays-based volume levels. On a base of 4 million Stays, a one-tenth difference in average party size produces a difference of 400,000 travelers.

Length of Stay

- Overnight leisure average stay length peaked for Utah in 2005. Thirty-five percent of non-resident overnight leisure travelers visited for only one night. Thirty percent of residents stayed for one or more nights, suggesting that the remaining seventy percent of residents must have traveled for day-trips. This hefty share explains why characteristics among resident and day-trips visitors in this report are so similar.

Average Daily Sending

- Utah's travelers spent the most per day on transportation across all spending categories. Non-residents spent \$11 more on transportation than travelers to the average U.S. destination (\$27). Relative to 2004, there were only slight upward shifts in spending categories.
- Total daily spending by overnight leisure visitors to Utah increased 12 percent in 2005, from \$74 to \$83 per person per day. Utah provides a better value for overnight leisure travelers than the U.S. average (\$102) and the competitive set average (\$105). Non-residents also spent more than the U.S. average per day (\$107) while residents only spent an average of \$61 per day.



Activities

- Overnight leisure visitors to Utah enjoy a variety of activities when traveling in the State. What sets Utah apart from the competition are its parks and other unique outdoor selling propositions. When compared to travel activities nationally, Utah visitors have a strong propensity for snow skiing, hiking/biking, national and state parks.
- The majority of travelers in 2005 enjoy sightseeing (30%) and nature-related activities such as national or state parks (22%), hike/bike (13%), camping (9%), and expenditure-based activities such as dining (20%), entertainment (19%), and shopping (16%).

Mode of Transportation & Trip Timing

- The vast majority of Utah overnight leisure visitors traveled by car. Twenty percent of non-residents flew into Utah compared to only 13% of visitors traveling to the average U.S. destination by air. The most popular travel month was August (13%), followed by June (12%). Summer was the most popular season for Utah's travel segments in 2005, except for residents who traveled more in the fall. Spring travelers spent the most per trip (\$878).

Accommodation Type

- Due to the large share of overnight leisure visitors that travel to Utah for General vacation, Getaway weekend, and special events, the State hosts 43 percent of visitors staying in paid Hotel/Motels. This is similar to U.S. and competitive set norms. However, Utah still hosts many of its overnight leisure visitors in private homes with friends and relative, 34 percent. Naturally, those overnight leisure travelers staying in hotels and motels generate more trip-dollar shares (55%) than stays (42%), solidifying their monetary importance to the State.



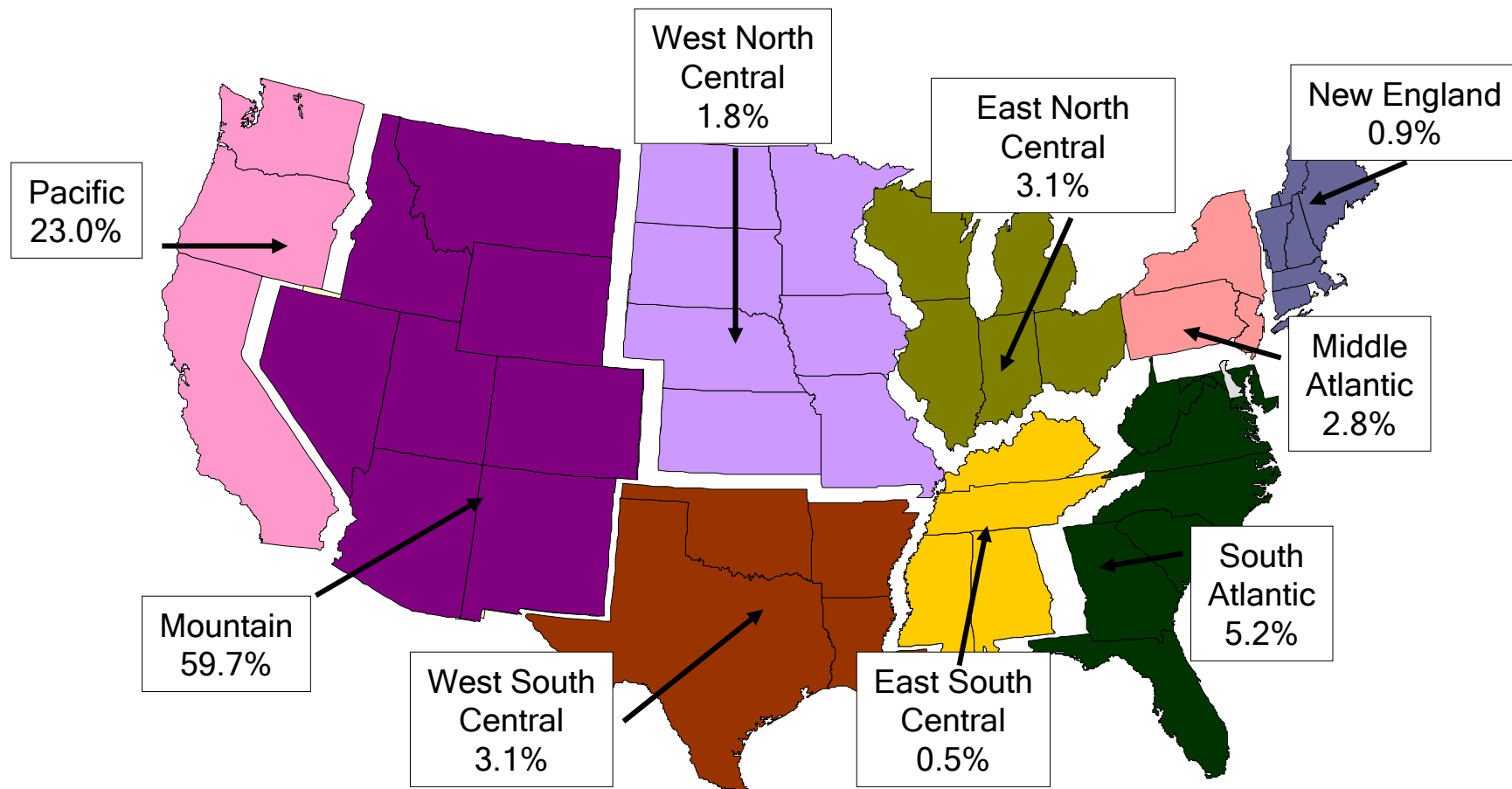


- The *Communicating* section will help travel marketers and planners know the key markets that generate the destination's largest share of visitors. This will help destinations launch marketing communications to markets that are likely to convert 'lookers to bookers.' Several origin market geographies are analyzed to give the destination a comprehensive view of where their visitors reside. The following describes these geographies:
 - The U.S. Census Bureau groups U.S. states into nine regions for statistical reporting purposes. These regions are based on purposes established in 1910 and are provided here for comparison to other Census data. This report evaluates the nine Census regions.
 - Defined by Nielsen Media Research, Inc, DMAs or Designated Marketing Areas denote a geographical area consisting of a primary city and surrounding county or counties. The DMAs represent a unified geographic media market. There are 210 DMAs in the U.S. Every U.S. county is in one and only one DMA.
 - MSAs reflect the Metropolitan Statistical Area, another concept developed by the U.S. Census Bureau. MSAs reflect groups of counties related to one another socially, geographically, and economically. There are more than 300 MSAs in the U.S. Not every county is in an MSA.
- In addition to knowing from where visitor's originate, the *Communicating* section also provides an analysis of the destination's competition and their respective share of the key origin markets. This analysis will help destination's know where else their visitors travel and, armed with the travel intelligence provided throughout this report, travel marketers can prepare a strategy to lure visitors away from the competition.

Top Origin Regions for Travel to Utah (2005/% of Overnight Leisure Person-Stays)



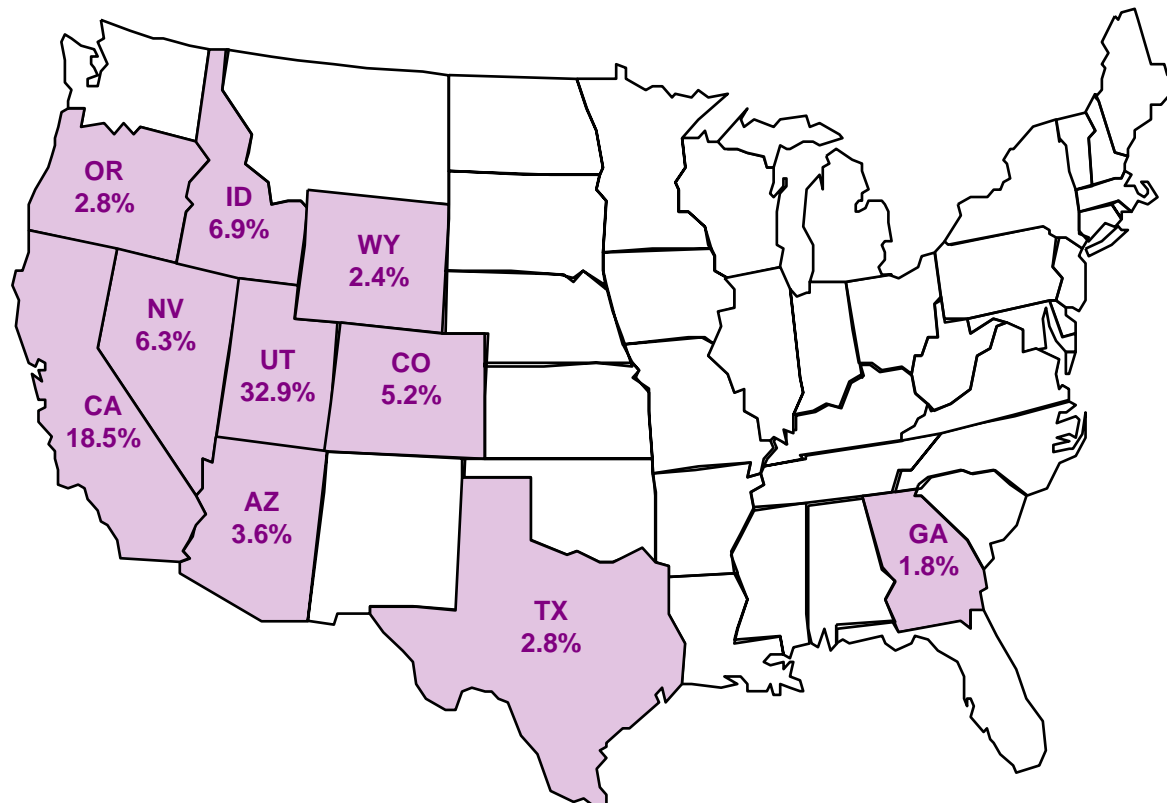
The U.S. Bureau of Census groups states into nine regions. More than half of Utah overnight leisure visitors live in the Mountain region (59.7%). Visitors live mainly in the Western regions with an additional 23 percent in the populous Pacific region.



Utah Top Origin States (2005/% of Overnight Leisure Person-Stays)



The largest proportion of Utah overnight leisure visitors come from the State itself (32.9%), followed by California (18.5%). The top ten states produce 83.2% of Utah visitors.



Utah Top Origin DMAs

(2003-2005/% of Overnight Leisure Person-Stays)



Visitor origin market data has been combined for three years - 2003, 2004, and 2005 - to provide better stability or reliability of the findings. The top ten markets account for 76.1% of all Utah visitors. Markets are sorted in descending order by Utah's top markets.

	U.S.	Comp Set	Utah
Salt Lake City, UT	1.0%	3.6%	40.3%
Los Angeles, CA	5.3%	8.3%	10.4%
Las Vegas, NV	0.6%	1.5%	6.2%
Idaho Falls-Pocatello, ID	0.2%	1.9%	4.3%
Sacramento-Stockton-Modesto, CA	1.5%	1.1%	3.3%
Denver, CO	1.3%	10.6%	3.1%
Phoenix, AZ	1.5%	9.2%	2.9%
Boise, ID	0.2%	1.6%	2.3%
San Diego, CA	1.2%	2.4%	1.7%
San Francisco-Oakland-San Jose, CA	2.7%	1.8%	1.6%
Top 10 Sum	15.5%	42.0%	76.1%

Utah Avg. Party per Trip Spending by Origin DMA (2003-2005/\$ Overnight Leisure Person-Stays)



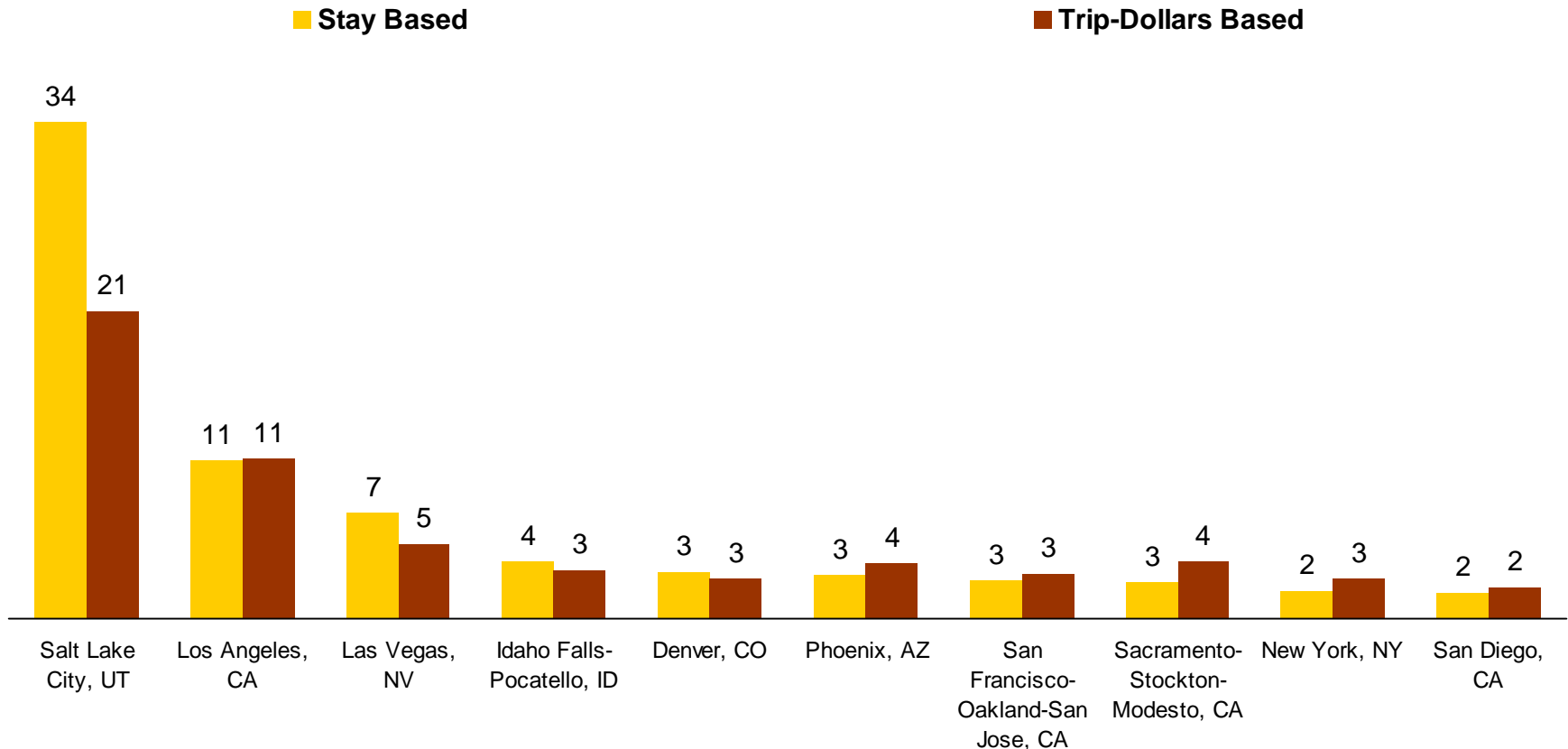
Travel parties traveling to Utah during 2003-2005 from Santa Barbara-Santa Maria-San Luis Obispo DMA had the highest average party per trip spending (\$1,660). In fact, the top spending DMAs are not in Utah - they are mainly from States further away such as California.



Utah Origin DMA Comparison (2003-2005/% of Overnight Leisure)



During 2003 through 2005, Salt Lake City contributed over a third of all of Utah's overnight leisure stays (34%) while only generating 21 percent of spending. Other DMAs such as Phoenix, Sacramento and New York generated slightly more trip-dollars spending than their share in stays.



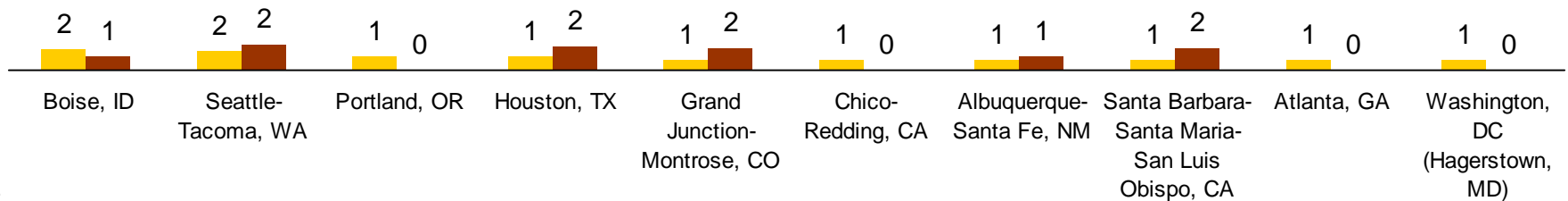
Utah Origin DMA Comparison (Con't) (2003-2005/% of Overnight Leisure)



This is a continuation of the previous graph.

■ Stay Based

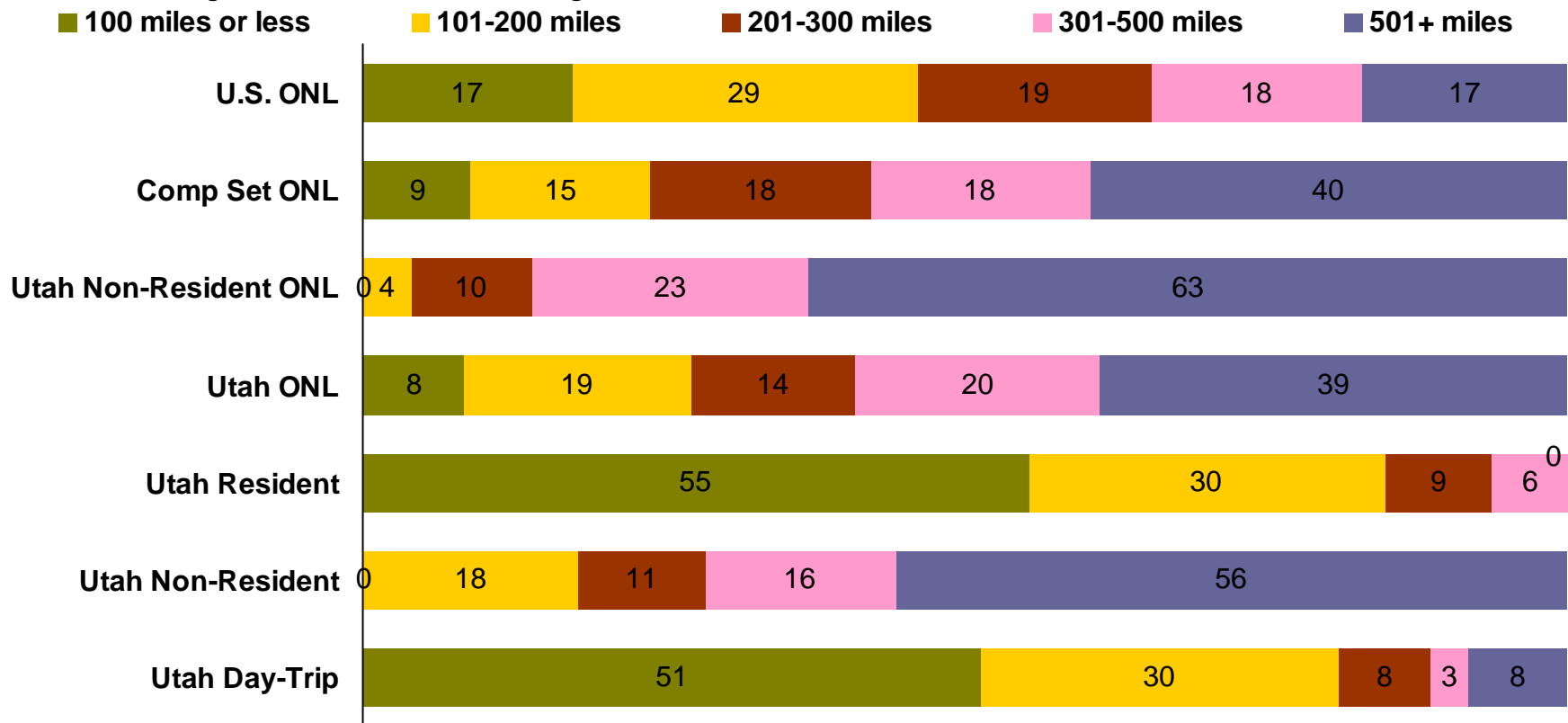
■ Trip-Dollars Based



Travel Distance Distribution By Auto: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



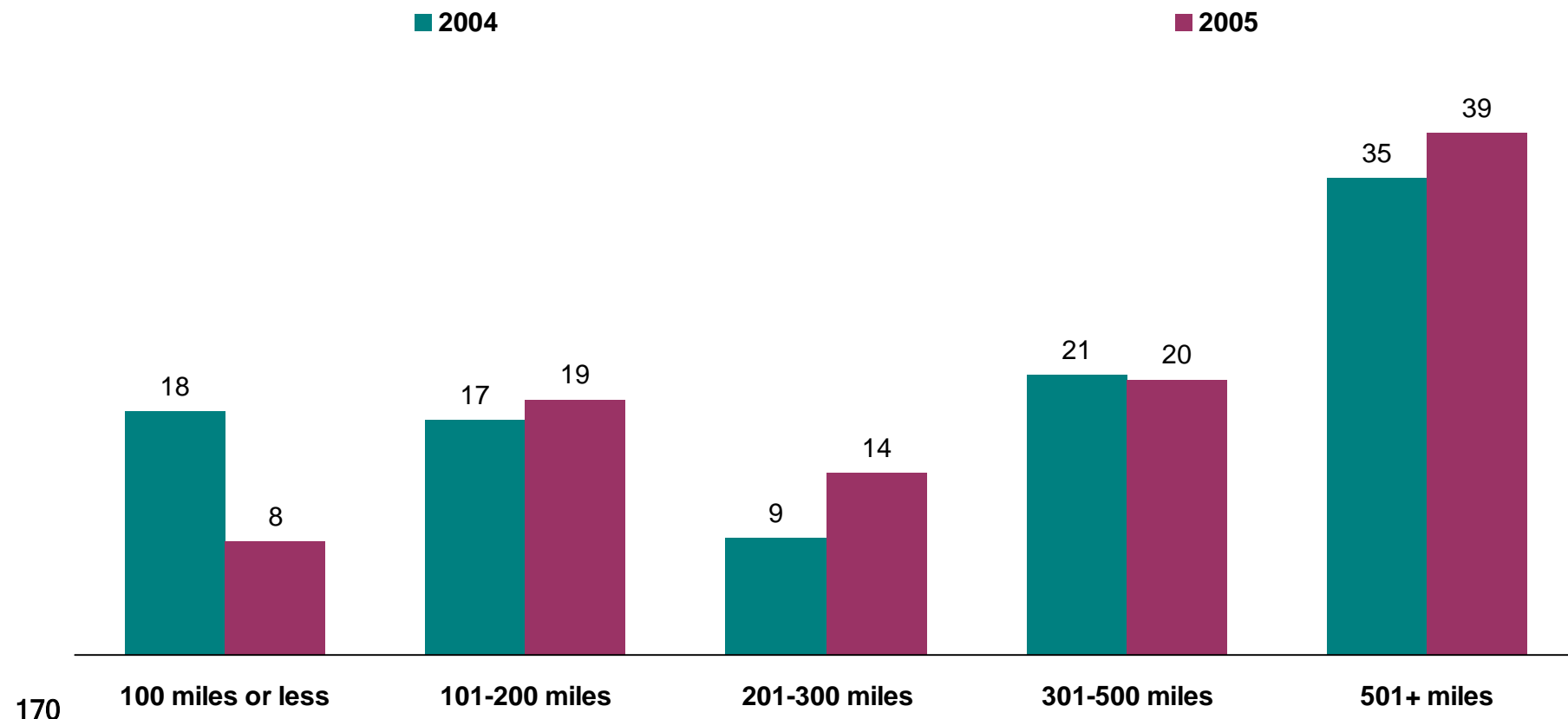
This chart provides a different perspective on origin markets, the one-way travel distance to the destination from the visitor origin market. Utah receives the greatest proportion of overnight leisure auto travelers from the distance range of 501+ miles (39%), fueled mainly by the non-resident overnight leisure travelers (63%), a share that is much higher than that of the U.S. (17%), but similar to the comp set (40%). Similar to other graphs in this report, the distribution for Utah residents (55%) and day trippers (51%) is similar as over half of these visitors travel 100 miles or less, far higher than the U.S. average of 17%.



Utah Travel Distance Distribution By Auto (2004 vs. 2005/% of Overnight Leisure Person-Stays)



Between 2004 and 2005, the share of overnight leisure visitors in Utah that traveled short distance, 100 miles or less, decreased from 18 percent in 2004 to eight percent in 2005. In Utah's overnight leisure market, there were shifts in travel distances between this time period, away from the short travel distance to either trips of 201-300 or 501+ miles.

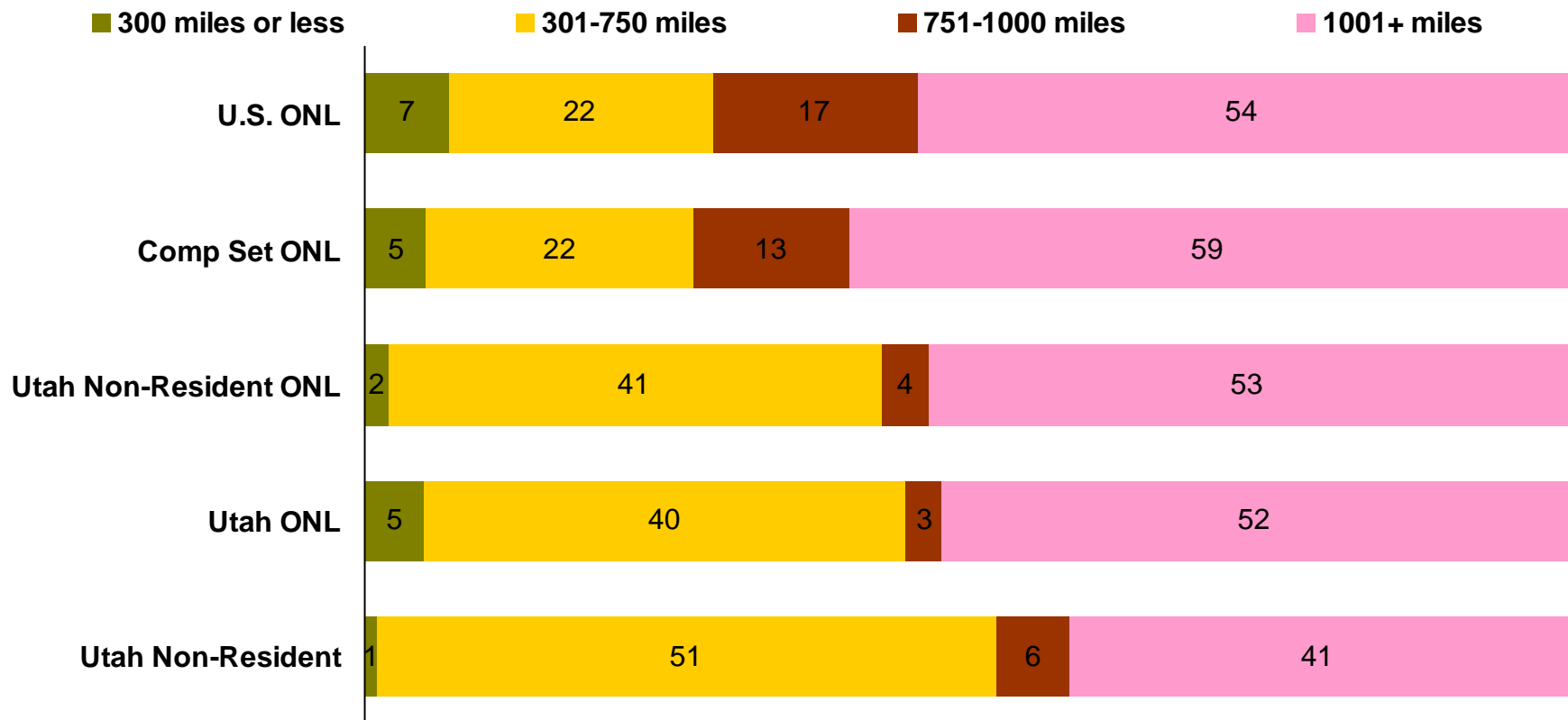


Travel Distance Distribution By Air: U.S., Comp Set, and Utah's Travel Segments (2005/% of Person-Stays)



Those traveling by air naturally came from farther away; more than half of overnight leisure visitors to Utah came from over 1,000 miles away (52%), slightly lower than that of the comp set (59%). Utah overnight leisure mimicked the U.S. average except for those flying 301-750 miles one-way (40%) and 751-1,000 miles one-way (3%), which were both higher and lower than the U.S. averages (22% and 17%, respectively).

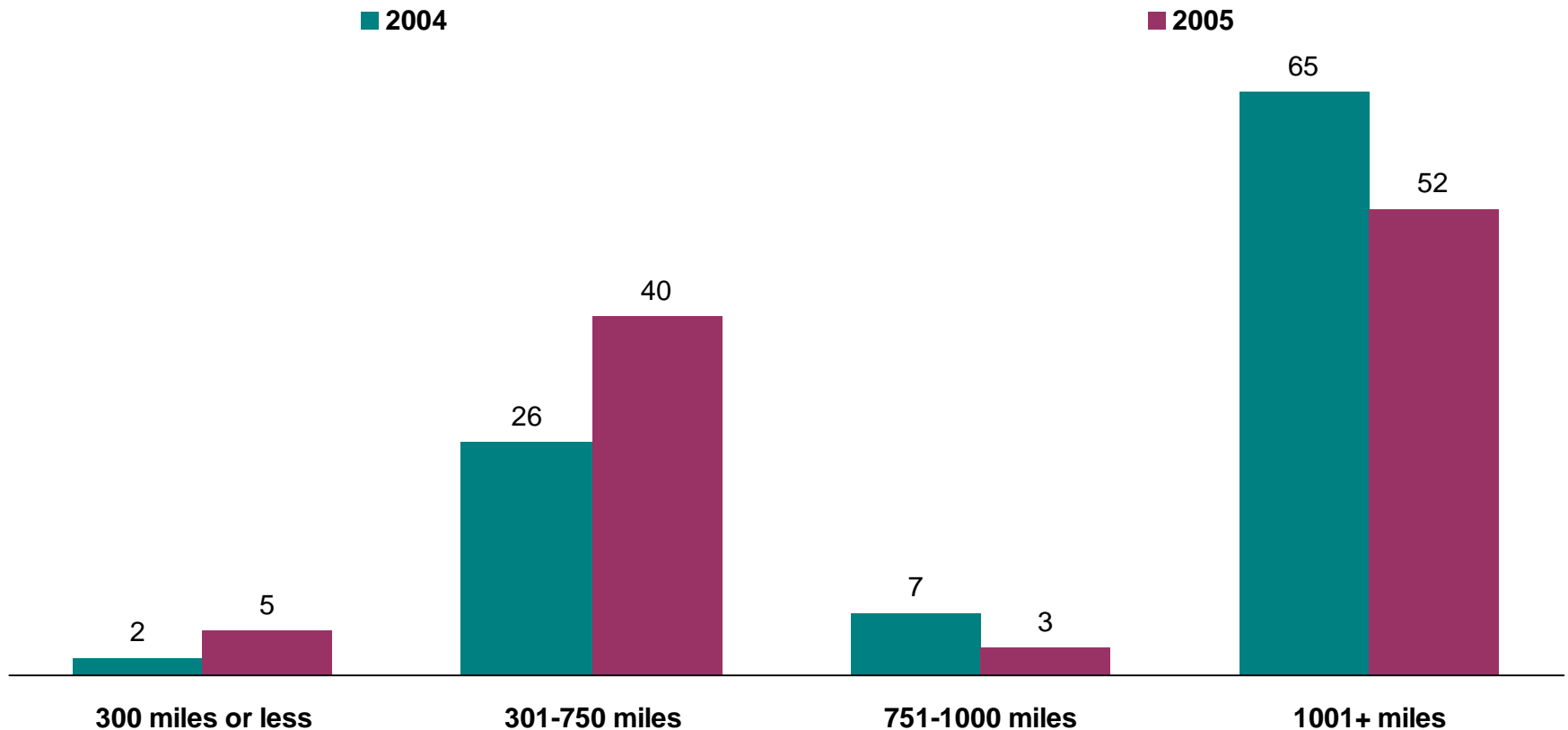
Note: sample sizes for day trip and Utah resident were too small to be included.



Utah Travel Distance Distribution By Air (2004 vs. 2005/% of Overnight Leisure Person-Stays)



Utah experienced a 14 percentage point increase in the share of those flying 301-750 miles and a dramatic 13 percentage points drop in the proportion of those coming from distances over 1,000 miles.





Origin Markets

- Utah visitors live mainly in the Western regions of the U.S.
- Nearly eightythree percent of Utah's overnight leisure visitors come from the top ten origin State. Utah accounts for the highest share at 32.9 percent, followed by California (19%), Idaho (6.9%), and Nevada (6.3%).
- When evaluating the top origin DMA's, the study analyzed the 2003-2005 timeframe for increased accuracy. The top five origin markets in this time period were: Salt Lake City, UT (40.3%), Los Angeles, CA (10.4%), Las Vegas, NV (6.2%), Idaho Falls-Pocatello, ID (4.3%), and Sacramento-Stockton-Modesto, CA (3.3%).
- Utah gained shares of visitors traveling by car from distances 201-300 and over 500 miles but lost shares of those coming from the nearest locations less than 100 miles away in 2005.



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Syndicated -

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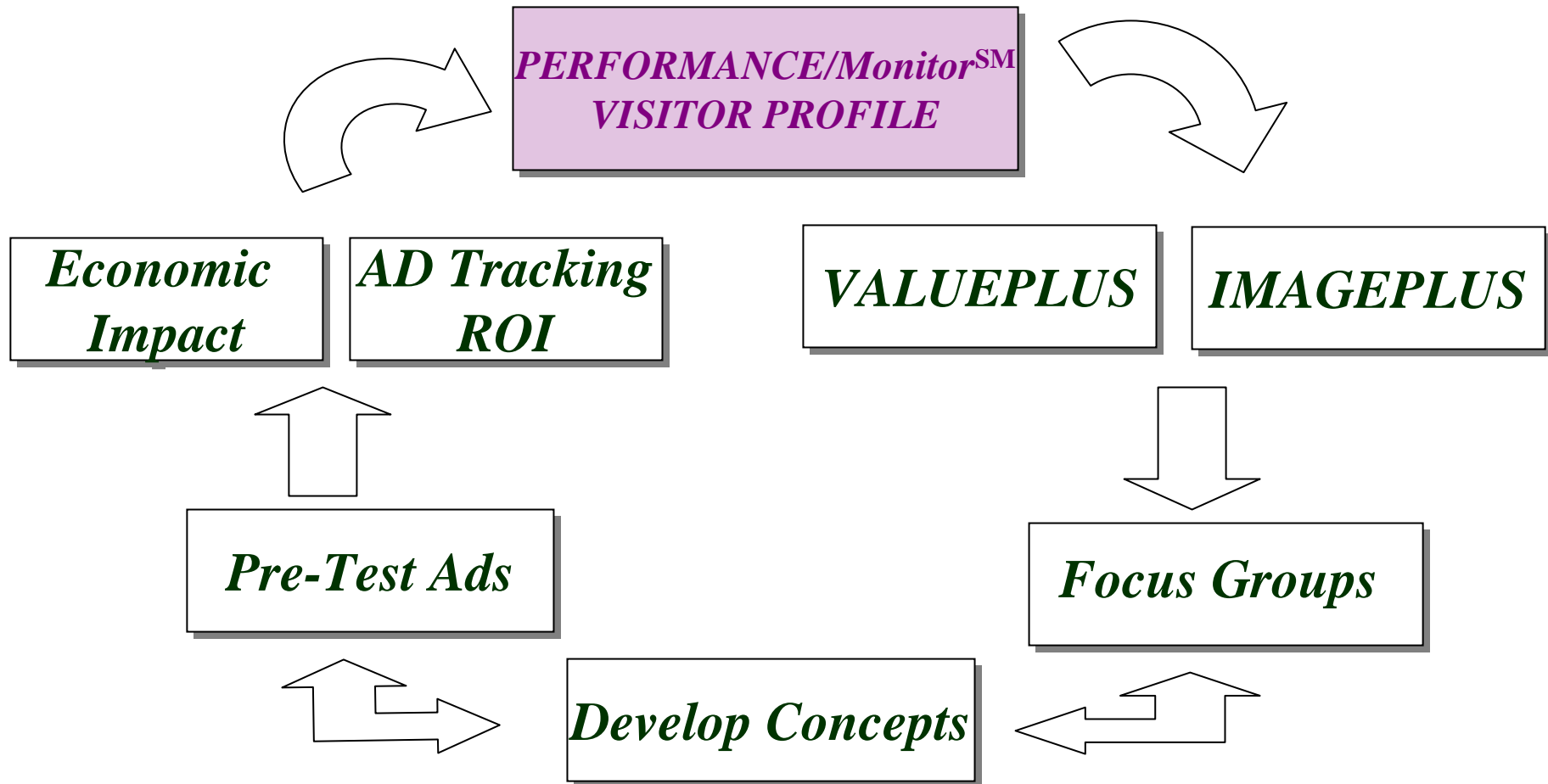
- Segmentation and positioning studies to assist clients in strategic marketing efforts
- Clients include destinations, theme parks, credit cards, auto clubs, hotels chains among others



- **States:** Alabama, Arizona, Arkansas, California, Florida, Illinois, Indiana, Kansas, Kentucky, Louisiana, Maryland, Michigan, Minnesota, Mississippi, Missouri, New York, Pennsylvania, Texas, Utah, Vermont, West Virginia, and Wisconsin
- **CVBs:** Asheville, Atlantic City, Baltimore, Boston, Branson, Buffalo, Chicago, Cleveland, Dallas, Detroit, Durham, Hilton Head, Indianapolis, Los Angeles, Louisville, Kansas City, Kissimmee/St. Cloud, Long Island, Louisville, Miami, Myrtle Beach, Nashville, New York City, Niagara Falls, Orlando, Panama City Beach, Phoenix, Pigeon Forge, Providence, Salt Lake City, San Antonio, San Diego, San Francisco, Savannah, Traverse City, and Tulsa
- **International:** British Columbia, Canadian Tourism Commission, Israel, and Ontario.
- **Attractions/Theme Parks:** Numerous attractions including most major theme park companies.
- **Hotel/Motels:** Cendant (7 Brands), Marriott (8 Brands), Accor (4 Brands) and InterContinental Hotel Group (3 Brands), Carlson Companies (Country Inns & Suites, Radisson). Other hotel clients include Best Western, Extended Stay America, Hilton, Hyatt (AmeriSuites), La Quinta (Baymont Inns) and Microtel Inns.
- **Other Clients:** AAA, Arthur Andersen, AVIS, Bear Stearns, Discovery Communications, Enterprise Rent-A-Car, Ernst & Young, Fairfield Communities, General Electric, IACVB, Marriott Vacation Club, Price Waterhouse Coopers, Port Authority of New York and Utah, USA Today, and VISA USA.



- DKS&A's client-value philosophy uses an integrated approach to implementing a client's marketing research efforts. We generally initiate research with a comprehensive visitor profile report and competitive analysis of the overnight leisure visitor.
- We have collected U.S. traveler data since 1992 (domestic and international), which is sold on a syndicated basis and reduces the cost of data collection for all subscribers. Yet each of our destination clients receives a custom report of their information and their competitors. We can further "MINE" our data to provide clients with "niche" segmentation reports and origin market outbound travel reports.
- We also conduct awareness and usage studies, visitor satisfaction and value studies and work with clients to develop branding and communication strategies.
- We work with our clients to develop and pre-test advertising.
- We also measure the results of advertising campaigns and marketing efforts in the field.
- We have exclusive associations with other leading companies in specific research and economic disciplines that provide our clients with world class expertise in key areas of marketing research and accountability.
- This integrated approach is designed to maximize our client's resources and produce actionable marketing intelligence, which we believe will produce better decision making and bottom line results.





- All of the information contained in this report is derived from D.K. Shifflet and Associates' **DIRECTIONS®** tracking system.
Travel definition: An overnight trip or any day-trip greater than 50 miles one-way from home
- To meet the need for quality information, DKS&A conducts the largest, ongoing, monthly survey of U.S. consumers' travel behavior—the **PERFORMANCE/MonitorSM**.
 - Each mailing goes to an average of 45,000 households per month.
 - Each survey collects the previous 3 months of travel behavior.
 - DKS&A uses an overlapping monthly mail sequence which reduces sample bias for maximum accuracy.
 - More than 75,000 traveling households respond to the survey each year. This results in more than 154,000 stays at destinations throughout the U.S.
 - New in 2005 - added an average of 9,000 online sample mailout per month
- Our methodology provides superior quality control measures:
 - We use the Synovate, Inc (formerly Market Facts, Inc.) household panel—households who have agreed in advance to periodically participate in mail and phone surveys. Extensive information about the household and its members is obtained at the time of household recruitment. Thus, a key advantage of the household panel is knowing to whom surveys are sent and from whom surveys are received. Another key advantage of the panel method is higher response rates to surveys—typically 2 to 3 times higher.
 - The 45,000 average monthly mailings are balanced to the U.S. population across six demographic variables (age, gender, income, education, number of adults, and state of residence). Returned questionnaires are re-balanced to these same variables. This re-balancing ensures findings reflective of the U.S. population and enables findings to be projectable to the entire U.S. population.



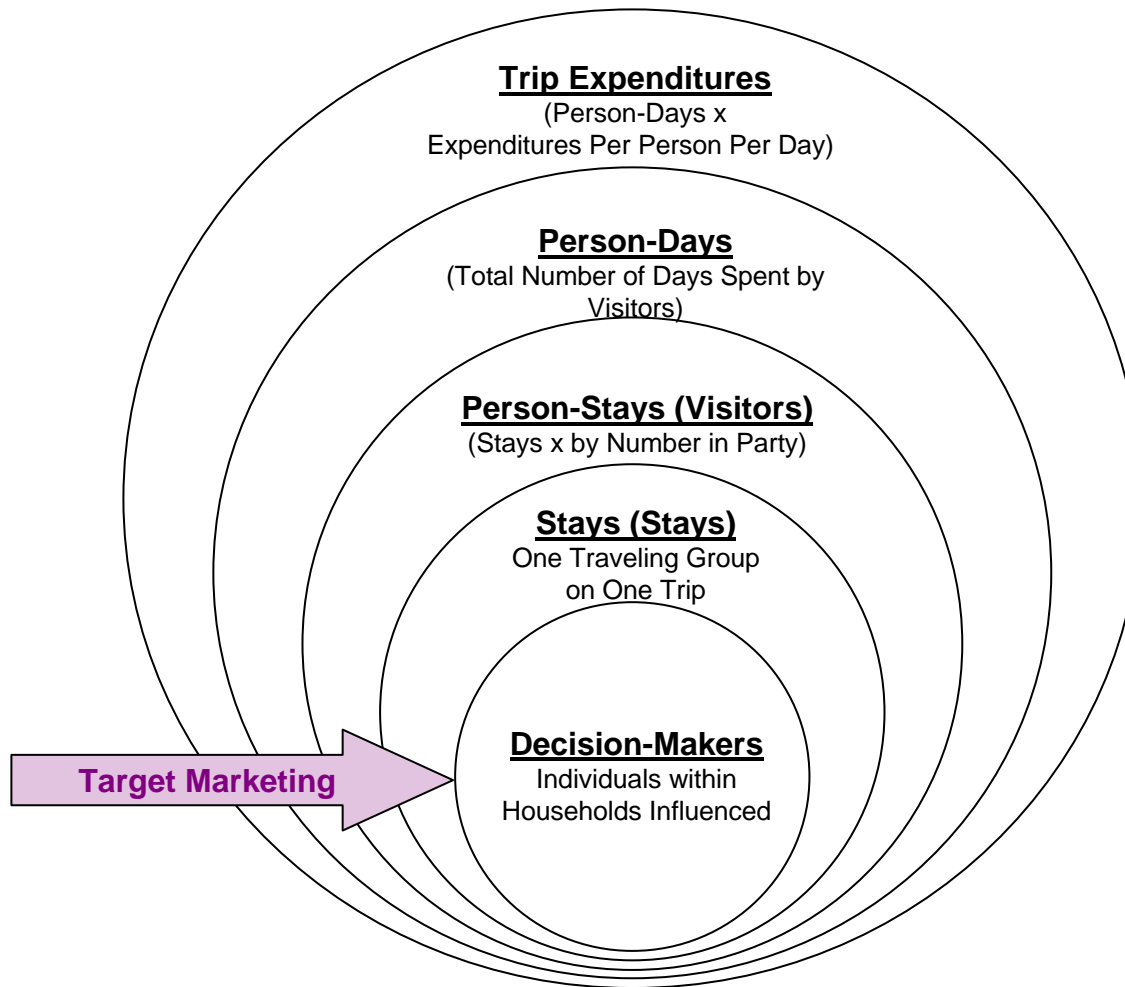
- Returned questionnaires go through an extensive set of manual (visual) and automatic (computer program) processing checks to improve data quality. Questionnaires containing anomalies are discarded or corrected based on insights developed from more than a decade of processing experience.
- All volume estimates in this report are based on a revised visitor volume methodology. The revisions reflect changes in the national-level model and the incorporation of a small-area estimation model. The national-level revisions were necessary following the dramatic changes to travel behavior following September 11, 2001. The small-area estimation component adds enhanced reliability to quarterly and annual estimates by using other data sources (such as hotel room demand and government transportation statistics) as data “anchors” or “reality checks.” Data reported reflect the influence of the revised volume model and the influence of revised population estimates resulting from the 2000 Census.
- Data tables that show all the detailed data collected in this study are delivered to the client. Responses are shown for the total sample as well as key subgroups. The percentages of some questions may exceed 100% due to the rounding of numbers and/or multiple responses permitted for that particular question.



- *Objective* - Describe the *domestic* travel market in Utah compared to the U.S. and competition.
- *Sampling Frame* - All U.S. domestic travelers on mail panel during 2005 in the following destinations:
 - Utah
 - Competitive Set (Colorado, Arizona, New Mexico, Northern Rockies Region)
- *Timeframe* - The timeframe used for the report includes six consecutive years of visitor volume and spending estimates (2000, 2001, 2002, 2003, 2004 and 2005) and a two year comparison on most measures for the profile data (2004 vs. 2005). All data for day-trippers and residents is reported on a two-year roll as the sample size for 2005 was not sufficient enough to draw conclusions.



- DKS&A can present the results of our **DIRECTIONS® PERFORMANCE/MonitorSM** study of U.S. travelers at many levels. Each level of reporting is used for different purposes.
- The smallest unit is the Decision-Maker, commonly the target of your marketing efforts. The largest measure of visitor volume is *Trip Expenditures* and answers the question “How much did they spend”?
- To answer the question of “How many people came and bought your product (destination)?”, we report the number of people who visited and how long they stayed, i.e., *person-days*. Person-Days is a cumulative measure of total volume of travel generated by travelers, and is therefore an appropriate measure to use when discussing a destination’s volume and relative market share.
- In contrast, the number of *Person-Stays* taken to a destination tells you how many people came to your destination, but not how long they stayed. For example, this measure tells you how many people traveled for overnight leisure. It does not tell you how long they stayed, just that they were there for leisure.
- People often travel together with family, friends or with other groups. The number of *Stays* tells you how many distinct groups of travelers came to your destination.





- In most cases, use of weights depends on what you are trying to learn through the data.
- There are not necessarily any “right” or “wrong” weights to use in most cases.
- However, there are some variables that **MUST** use a specific weight.
- A weight makes a particular case, or response, more or less important.
 - Unweighted Data
 - Respondent Weight
 - Travel Weights
 - Stays Weight
 - Person-Stays Weight
 - Person-Days Weight
 - Room Nights Weight
 - Trip-Dollars Weight



- Unweighted data is the raw data.
- Contains no links to the population or DKS&A data modeling.
- It is simply respondent data as returned to us on the surveys.
- Note that we mail surveys out to a representative sample of the U.S. population (through our mail panel, called Synovate).
- However, the returned surveys are not representative.
- The returned surveys are the raw, unweighted data.
- When we “re-balance” the data based on population, we arrive at the Respondent-Weighted data.
- Use Unweighted data, or No Weight, when running sample counts in **DIRECTABSSM** (Distinct, Count).



- The Respondent Weight is the most basic form of weighted data to represent the U.S. population
 - Creates only links to the population and not to any modeling of the data.
- Weights the data by the demographic characteristics of age, gender, income, education, number of adults, and state of residence.
- Population distributions are obtained from the Current Population Survey's Annual Demographic Survey, which is conducted by the U.S. Census Bureau for the Bureau of Labor Statistics.
- Again, we use the respondent weight to run the most "untouched data". In other words, there are no other influences introduced from our data models.



- Stays Weight is the most basic travel weight. It is the broadest unit used for measuring a travel experience.
 - To arrive at the stays weight, the respondent weight is adjusted based on certain variables in order to ensure that there are a certain number of trips that fit a certain number of standards.
 - These adjustments are based on length of stay, length of trip, mode of transportation, purpose of trip, and special adjustments for particular mailing months and destinations.
 - Stays Weight reflects the “stay” in its rawest form: a little more subtle than the respondent weight.
- Mr. & Mrs. Smith’s 5-day vacation in Anytown, USA = 1 Stays, or 1 visit, or 1 STAY.*
- Keep in mind that a trip can have multiple stays.
 - For example, a person can travel from their house in Maryland, spend the day and night in Washington, D.C., then drive Philadelphia, PA for a day and night and then back home to Maryland. This is one trip, but two stays. DMOs profile the “stay” at the particular destination. States profile all stays that were part of the trip.
 - After running data using no weights (or unweighted), then using the respondent weight, the stays weight is then a good weight to use to help explain causes of change in volume segments, because it is the purest way of looking at characteristics of the stay without any other influences. This progression of running data as unweighted, followed by the respondent weight, and finally using the stays weight is the appropriate progression to sorting out a data problem.
 - The stays weight is the appropriate weight to use if you want to profile your Stays.



- **Person-Stays Weight** = The total number of people on a stay, regardless of the length of their stay. This measure generally equates to the number of visitors.

Stay Weight * Total Party Size

- Person-Stays weight is like Person-Days excluding the length of stay
- If you are running a “profile” of your visitors, this is the most common and proper weight to use, with a few exceptions.
- Use of this weight takes into account the number of people on a trip. Stays that are larger in size have higher person-trip weights, while Stays that are smaller in size have lower person-trip weights.

Mr. & Mrs. Smith's 5 day vacation in Anytown, USA = 2 Person-Stays or 2 visitors.



- **Person-Days Weight** = The total number of people on a stay multiplied by the number of days they are on the stay. I.E. You and a friend go to Cleveland for a week (7 days). This would be 2 people x 7 days each = 14 person-days.

*Person-Stays * Number of Days in Stay*

- Use of this weight takes into account the number of people on the trip as well as how long they stayed. Stays that are larger in size and stayed for longer periods of time have higher person-day weights.
- The Person-Days weight is the best “proxy” weight for Trip-Dollars, because the Trip-Dollars weight has issues and is subject to very large variation due to smaller sample size and the nature of reporting information about money spent.

Mr. & Mrs. Smith's 5 day vacation in Anytown, USA = 10 person-days (2 Person-Stays x 5 days)



- **Room Nights Weight** = The number of nights spent in a room, regardless of the number of people staying in the room.

*Stays Weight * Number of Nights in Stay*

- Room Nights Weight is like Person-Days minus the people
- Use of this weight takes into account only the number of nights spent in rooms.
- This weight is generally only used for data dealing with those travelers that stayed in paid accommodations, but it can be used to measure stays in other accommodations.

Mr. & Mrs. Smith's 5 day vacation in Anytown, USA = 5 Room Nights (given they stayed in a paid accommodation (most applicable))



- **Trip-Dollars Weight** = Use of this weight takes into account the amount of money spent by travelers. In other words, it accounts for the dollars contributed to a destination's economy by travelers. Using the trip-dollars weight shows the monetary worth/contribution of travelers as opposed to the contribution of number of trips or number of days spent in the destination.

*Stays Weight * Total Stays Spending*

- It is very interesting to compare data run in Person-Stays to the same data run in trip-dollars. For example, Couples may account for 20% of a destination's Person-Stays, but may account for 40% of a destination's trip-dollars.

If Mr. & Mrs. Smith spent \$100 per person per day on their 5 day vacation in Anytown, USA, their trip expenditures would be \$1,000 (10 person-days x \$100 per person per day).

General Rules of Thumb when Choosing Weights



- When selecting the proper weights to apply to data, the following general rules apply. There are a few important exceptions, which will be described.
- When choosing a weight, do not choose a particular weight if the weight and the variable have a common concept. For example, the variable party composition includes the concept of party size. Thus, you would not want to use the Person-Stays weight, because that also includes the concept of party size.
- When you profile visitors to your destination, the Person-Stays weight is generally preferred for the overall profile because you are seeking to understand the travel behaviors and characteristics of the entire population of your visitors.
- When you are running data to help determine potential travelers (behaviors and characteristics) an appropriate weight to use would be the Stays Weight. This is because you profile or describe your individual visitors, but you market via various forms of media to households, not individuals. Households are generally the Stays who make the “stay” in your destination.
- The variable of Party Size has an impact on just about every variable.
- Example: There is a strong correlation between party size and length of stay. You should be careful when you say that your visitors are staying longer if you see an increase in the average length of stay. In fact, it may be the case that your visitors were not really staying for longer periods of time. It may be that there was actually an increase in party size. There may have been an increase in share of travel by Families (which have a larger party size) and Families tend to stay for longer periods of time. So, the driver for an increase in length of stay that you may be seeing may be due to the fact that you simply had an increase in share of larger Stays like Families, who also tend to stay longer, but may not have actually increased their length of stay.



	P-Trips Report	P-Days Report	R-Nights Report	Trip-Dollars Report
<i>Age</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Income</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Party Composition</i>	Stays	Trip-Days	Room Nights	Trip-Dollars
<i>Occupation</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Education</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Length</i>	Person-Stays	Person-Stays	Stays	Trip-Dollars
<i>Transportation</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Accommodations</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Expenditures</i>	Person-Days	Person-Days	Person-Days	Person-Days
<i>Travel Agent Usage</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Leisure Purpose</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Business Purpose</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Activities</i>	P-Ts or Stays	P-Ts or Stays	Stays	Trip-Dollars
<i>Distance</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Seasons</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Ratings</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars
<i>Origin Markets</i>	Person-Stays	Person-Days	Room Nights	Trip-Dollars



- Party Composition - Party Composition is best run using the Stays Weight (if you are running it in conjunction with other data run using Person-Stays weight). The reason for this is that party composition already takes into account the “people” on the trip. So, you would not want to weight it using Person-Stays, which also takes into account the number of people, or party size. If you ran party composition weighted by Person-Stays, then larger Stays, such as Families, would get heavier weights and smaller Stays such as Couples or Adults Traveling Alone would get lower weights than they should. In a sense, you would be double-counting.
- Expenditures - Expenditures must ALWAYS be run using Person-Days Weight. The reason for this is due to the way we ask the question in the *PERFORMANCE/Monitor*™. We ask respondents to indicate how much they spent per person per day. Thus, the Person-Day Weight must be used.
- Length of Stay - Length of stay should never be run using Person-Days, Person-Stays or Room Nights weights, and should be run using Stays Weight. The reason for this is because this measure already takes into account the number of days a respondent is spending on the stay. So, running length of stay using Person-Days would be double counting - giving higher weights to those who stayed longer (more days). Room Nights also already includes a length of stay concept. In addition, Length of Stay should not be run using the Person-Stays weight. The reason for this is that Length of Stay and Party Size have a strong correlation. The Person-Stays weight contains the element of Party Size. Using the Person-Stays weight for Length of Stay may result in a false understanding of change in Length of Stay.
- Activities - Activities should be run using the Stays Weight or Person-Stays Weight and not the Person-Days Weight. Running activities in Person-Days makes the assumption that each person on the stay participated in each activity for each day. Running activities in Person-Stays makes the assumption that each person on the stay participated in each activity. Running activities using the Stays Weight makes the assumption that at least one person on the stay participated in an activity on at least one day of the stay.



The confidence interval table indicates how well the data-based on a sample-reflects the entire population of travelers. The smaller the interval, the more accurate the data and the greater confidence we have that the sample number represents the population. For example, if the air travel finding for the U.S. is 10%-using the chart below-we can say that the actual proportion of the population is 10% plus or minus 0.2 percentage point. DKS&A uses a 90% confidence level. Because it reflects a good balance between accepting a difference in findings as real when it in fact is not, and rejecting a difference as not real, when it actually is (in statistical terms, the tradeoff between making a “Type I” and “Type II” error).

	Percentage Finding in Report or Data Tables					
	Sample Size for 2005*	At or near 2% or 98%	At or near 5% of 95%	At or near 10% or 90%	At or near 25% of 75%	At or near 50%
U.S. ONL	41,160	0.1%	0.1%	0.2%	0.3%	0.4%
UTAH ONL	475	0.7%	1.4%	2.0%	2.9%	3.8%
Resident (2004-2005)	388	0.8%	1.5%	2.2%	3.2%	4.2%
Non-Resident	506	0.7%	1.3%	1.9%	2.8%	3.6%
Non-Resident ONL	359	0.9%	1.6%	2.3%	3.3%	4.3%
Day-Trip (2004-2005)	277	1.0%	1.8%	2.6%	3.7%	4.9%
Comp Set (NET) ONL	3,451	0.3%	0.5%	0.7%	1.1%	1.4%

*Except where otherwise noted. Some segments received 2004-2005 rolled data due to insufficient sample for 2005 data.

Note: Sample size differs slightly from table to table and reflects small differences in the proportion of respondents who answered the question



D.K. SHIFFLET & ASSOCIATES, LTD
*DIRECTIONS® PERFORMANCE MONITOR*SM
SURVEY QUESTIONS (3-17-05)

Sample Contacted Annually: 540,000 Households

45,000 Per Month - Every Month - Year After Year

[unless otherwise identified, each measure generally available by month back to 1992]

1. Age of Respondent [Open End/Actual]
Gender of Respondent ☐ Male ☐ Female
2. List your frequent traveler programs and travel club memberships (name of airlines, hotels, rental cars, auto club: AAA, etc; AARP). (List up to 6)
[Open End/Coded]
3. **Last 12 months**, number of nights you stayed in paid lodging (e.g. hotel, condo, ship, campground) for:
Business: Number of Nights [Open End/Actual]
Leisure: Number of Nights [Open End/Actual]
Theme Parks: Number of Times [Open End/Actual] *Added 06/96*



4. **Past 3 months** travel, both business and leisure, how many did you take of:

4a. Overnight Trips: A night away from home, local or distant.

Overnight Trips: Number of Times [Open End/Actual] ("0" if none)

4b. Day Trips: out of your local area (50+ miles one way).

Day Trips: Number of Times [Open End/Actual] ("0" if none)

If "0" to both questions 4a and 4b, stop here. Otherwise continue with question 5.

5. Answer for all day and overnight trip(s) in the past 3 months. (up to 9 trips)

5a. **TRIP**

Trip Start: Month and Date [Open End/Actual]

Trip Length: Number of Nights [Open End/Actual] ("0" if day trip)

Was the trip a group tour? [Y/N]

5b. **Stays COMPOSITION**

Number of Men [Open End/Actual]

Number of Women [Open End/Actual]

Number of Kids Age 0-17 [Open End/Actual]

Number from your Household [Open End/Actual]



5c. TRANSPORTATION

Main Mode of Transportation:

- | | | | |
|---|------------|---|-----------------------|
| 1 | Airline | 6 | Van/ SUV/ Small Truck |
| 2 | Amtrak | 7 | Large Truck |
| 3 | Car | 8 | Ship |
| 4 | Bus | 9 | Other |
| 5 | Camper/ RV | | |

Payment Method:

- | | | | |
|---|------------------|----|---------------------|
| 1 | Cash/ Check | 6 | Diners' Club |
| 2 | American Express | 7 | Other Card |
| 3 | MasterCard | 8 | Company Direct Bill |
| 4 | Visa | 9 | Points/ Miles |
| 5 | Discover | 10 | Other/ Free |

Reservation Type:

- | | | | |
|---|--------------------|---|--|
| 1 | No Reservation | 5 | Airline Co. Website <i>Added 11/02</i> |
| 2 | 800 Phone # | 6 | Other Website <i>Added 11/02</i> |
| 3 | Corp. Travel Dept. | 7 | Other |
| 4 | Travel Agent | | |

AIRLINE

If used, name main airline: [Open End/Coded]

Satisfaction Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

Value Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)



RENTAL CAR

If rented a Car/Truck, name the company [Open End/Actual]

Satisfaction Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

Value Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

Car Rental Payment Method:	1	Cash/Check	6	Diners' Club
	2	American Express	7	Other Card
	3	MasterCard	8	Company Direct Bill
	4	Visa	9	Points/ Miles
	5	Discover	10	Other/ Free

5d. EXPENDITURES BY CATEGORY (*"0" if none for You Only*)

Trip Package \$ (Fly/Hotel, Cruise, Group Tour, etc.) [Open End/Actual]

NOT IN PACKAGE

Main Transportation \$	[Open End/Actual] <i>Added 07/96</i>
Rental Car \$	[Open End/Actual] <i>Added 07/96</i>
Food/Drink \$	[Open End/Actual]
Entertainment/Recreation \$	[Open End/Actual]
All Shopping \$	[Open End/Actual]
All other <u>except</u> Accommodations	[Open End/Actual]



6. For all day and overnight trip(s) in the past 3 months, list each city visited.

6a. WHERE and WHEN

City (e.g. Miami): (If out of U.S., write city and country)

[Open End/Coded]

State (e.g. FL):

[Open End/Coded]

CITY RATINGS

Overall Destination Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Destination Value Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Number of visits in the last 3 years:

[Open End/Actual] *Added 05/96*
Changed 03/01

TRIP TIMING

Trip Start: Month and Day

[Open End/Actual]

Trip Length: Number of Nights

[Open End/Actual] (*"0" if day trip*)



6b. PURPOSE OF STAY

“Group Meeting”

“Transient Business”
Changed 03/01

Company Business

- 1 Convention
- 2 Training/ Seminar
- 3 Other Group Meeting
- 4 Client Service, Consulting
- 5 Inspection, Audit
- 6 Construction, Repair
- 7 Sales, Purchasing
- 8 Government/ Military
- 9 Other Company Business

Leisure/Personal

- 10 Getaway Weekend
 - 11 General Vacation
 - 12 Visit Friend/ Relatives
 - 13 Special Event
 - 14 Other Personal
- “Leisure Vacation”
“Leisure Non-Vacation”

Both Leisure and Business? [Y/N] *Added 03/01*

ACTIVITIES

List primary activities for each visit (list up to 4) and circle activity if it was main reason for the trip:

- 1 Eco-Travel *Added 03/01*
- 2 Parks: National, State, etc.
- 3 Visit Historic Sites
- 4 Museum, Art Exhibit, etc. *Added 03/01*
- 5 Concert, Play, Dance, etc. *Added 03/01*
- 6 Festival, Craft Fair, etc.
- 7 Night Life
- 8 Gamble
- 9 Watch Sports Event
- 10 Hike, Bike, etc.
- 11 Hunt, Fish, etc.
- 12 Snow Ski, Snow Board
- 13 Other Adventure Sports
- 14 Play Golf
- 15 Beach/ Waterfront
- 16 Boat/ Sail
- 17 Show: Boat, Car, Home, etc.
- 18 Theme/ Amusement Park
- 19 Touring/ Sightseeing
- 20 Look at Real Estate *Added 06/03*



6c. OVERNIGHT ACCOMMODATION

ACCOMMODATION STAYED

Name of Hotel/ Motel, Shipline, etc. (use chain/ hotel, and extension names, e.g. Seasons Inn Express). [Open End/Coded] *If friend/ relatives' home, use "Friend"*

ACCOMMODATION RATINGS

Overall Satisfaction: 1-10 Scale (1=Poor, up to 10=Excellent)

Value Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

Service Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

How many stayed in your room: [Open End/Actual]
Suite Room? [Y/N]

Location of Accommodation:	1 Airport	5 Small Town
	2 Downtown	6 Government Park
	3 Suburban	7 Ship
	4 Highway	8 Other

Type of Accommodation:	1 "All Suite" Hotel	7 Ship/ Cruise
	2 Resort Hotel	8 My 2nd home/ apt/ condo
	3 Hotel/ Motel	9 Home/ apt/ condo (not mine)
	4 Timeshare	10 Corporate Apartment <i>Added 07/04</i>
	5 Bed & Breakfast	11 Other
	6 Camping/ RV	



- Reservations for Accommodations:
- | | | | |
|---|--------------------|---|--|
| 1 | No Reservation | 5 | Travel Agent |
| 2 | Chain 800 phone # | 6 | Hotel Chain Website <i>Added 11/02</i> |
| 3 | Direct to location | 7 | Other Website <i>Added 11/02</i> |
| 4 | Corp. Travel Dept. | 8 | Other |
- How Paid for Accommodations:
- | | | | |
|---|----------------------|---|----------|
| 1 | Self/Friend/Relative | 4 | Per Diem |
| 2 | Expense Account | 5 | Free |
| 3 | Company Direct Bill | | |
- Payment for Accommodations:
- | | | | |
|---|------------------|----|---------------------|
| 1 | Cash/ Check | 6 | Diner's Club |
| 2 | American Express | 7 | Other Card |
| 3 | MasterCard | 8 | Company Direct Bill |
| 4 | Visa | 9 | Points/ Miles |
| 5 | Discover | 10 | Other/ Free |

ACCOMMODATION EXPENDITURE

- | | |
|-----------------------------------|--------------------------|
| Dollars Per Night (Room Only) | [Open End/Actual] |
| Total Hotel/ Lodging Bill | [Open End/Actual] |
| Special Deal? | [Y/N] |
| If in area again, will stay here? | [Y/N] <i>Added 11/03</i> |



DEMOGRAPHICS

Number of Persons in Household:[Actual]

Annual Household Income:	1	Less than \$5,000	15	\$40,000-\$44,499
	2	\$5,000-\$7,500	16	\$45,000-\$49,999
	3	\$7,500-\$9,999	17	\$50,000-\$59,999
	4	\$10,000-\$12,499	18	\$60,000-\$74,999
	5	\$12,500-\$14,999	19	\$75,000-\$84,999
	6	\$15,000-\$17,499	20	\$85,000-\$99,999
	7	\$17,500-\$19,999	21	\$100,000-\$124,999
	8	\$20,000-\$22,499	22	\$125,000-\$149,999
	9	\$22,500-\$24,999	23	\$150,000-\$174,999
	10	\$25,000-\$27,499	24	\$175,000-\$199,999
	11	\$27,500-\$29,999	25	\$200,000-\$249,999
	12	\$30,000-\$32,499	26	\$250,000-\$299,999
	13	\$32,500-\$34,999	27	\$300,000
	14	\$35,000-\$39,999		

Occupation of Adult Heads of Household:

1	Managerial/Professional	6	Operator, Laborer
2	Technical, Sales, Admin. Support	7	Student, Other
3	Service	8	Retired
4	Farming, Forestry, Fishing	9	Not Employed
5	Craftsman, Repairman		



Education of Adult Heads of Household: *Changed 10/02*

- | | |
|--------------------------|-------------------------|
| 1 Attended Grade School | 5 Attended College |
| 2 Graduated Grade School | 6 Graduated College |
| 3 Attended High School | 7 College Post Graduate |
| 4 Graduated High School | |

Marital Status of Head of Household:

- | | | |
|-----------|-----------------|--------------------------------|
| 1 Married | 2 Never Married | 3 Divorced/ Widowed/ Separated |
|-----------|-----------------|--------------------------------|

Children in Household (Age and Gender): [Actual]

Location of Household: State, DMA, ZIP Code, MSA, County

PRIZM coded respondents to block level address

All can be linked to Claritas PRIZM/Clusters and other databases

Available to clients as special purchase.



Leading Economic Indicators:

- In 2005, the U.S. economy grew by 3.5%. In the first two quarters of 2005, GDP growth was 3.3 and 3.8%, respectively. Real GDP grew at about 4.1 percent in the third quarter of 2005. However, by the fourth quarter the economy was slowing down with an annual increase of 1.7%. The slowdown in fourth-quarter GDP growth primarily reflected a deceleration in consumer spending.
- Personal disposable income per capita was also up in 2005, again a slight increase from 2004. The increase was still less than was enjoyed in the previous years.
- The growth in GDP and disposable income was also accompanied by an improvement in the unemployment rate. Unemployment rate ranged from 4.9 to 5.1 percent during most of 2005, a significant change from the previous year of 5.9%.
- As might be expected, Consumer Confidence provided a mirror image to the unemployment rate. By the end of December 2005, consumer confidence stood at 103.6, up from 95.97 in December 2004.
- As of March 2005, the unemployment rate is at 4.7%; and Consumer Confidence Index up from 102.7 in February, now stands at 107.2 indicating favorable signs for the overall economy.

See Table 1 for details of the 2005 economic indicators.



Table 1: Economy in Review - Other Economic Indicators

	Annual Totals				% Change		
	2005	2004	2003	2002	05/04	04/03	03/02
Consumer Confidence Index (base: 1985=100)	103.6	95.97	79.56	96.62	N/A	N/A	N/A
Real Gross Domestic Product (billions 000 \$)	\$11,221	\$10,756	\$10,321	\$10,049	3.50%	4.20%	2.70%
Per Capita Disposable Personal Income	\$27,376	\$27,232	\$26,788	\$26,356	0.51%	1.70%	1.60%
Per Capita Personal Consumption Expenditure	\$26,487	\$25,964	\$25,302	\$24,773	2.02%	2.60%	2.10%
Consumer Price Index (base: 1982-1984=100)	195.3	188.9	184.0	179.9	3.40%	2.70%	2.30%
Travel Price Index	221.4	210.2	201.1	196.8	5.32%	4.50%	2.20%
Unemployment Rate	5.10%	5.50%	6.00%	5.70%	N/A	N/A	N/A

Sources: Economic Indicators - Department of Commerce Bureau of Economic Analysis
Travel Price Index – Tourism Industry Association (TIA);
Consumer Confidence Index – Conference Board Consumer Confidence Survey



Travel Volume and Expenditures:

- In 2005, the travel industry too enjoyed a continued growth from 2004. Domestic Person Stays and Person Day volume continued to grow moderately from 2004. Leisure travel continued to be strong with overnight leisure travel up by 2.9%. Business travel has increased at the rate of 6.8%, with the growth mainly in day Stays up by 11.9%. Overnight business travel was up by only 0.6%.
- Total travel spending continued to be growing rapidly and stood at \$700 billion in 2005. The increase in travel spending can be attributed to spending on day business and overnight leisure travel.
- The good economy brought about an increase in the lodging industry coming almost exclusively from the leisure sector. There were about 950 million domestic Room Nights sold in the United States. This figure is an increase of 5.9% over the peak of 897 million Room Nights in 2000.
- The U.S. economy bounded ahead in the first quarter of 2005 fuelled largely by consumer spending. GDP grew at an annual rate of about 5%, the most in more than two years. Economists forecast spending will rise at an annual rate of 3 percent from April through June and the economy will expand at a 3.3 percent pace. Rising energy prices and a slowing housing market will cool growth, but growing business investments will sustain growth in the next 3 quarters.

See Table 2 for details of U.S. domestic travel statistics for 2005.

2005 Economy in Review (continued)



Table 2: Economy in Review - U.S. Volume and Direct Spending

	2005	2004	2003	2002	05/04	04/03	03/02
Hotel Room Night Volume (millions)							
Total	950.0	923.1	884.0	869.2	2.9%	4.4%	1.7%
Business	456.5	460.9	454.1	461.2	-1.0%	1.5%	-1.6%
Leisure	493.5	462.2	429.9	408.0	6.8%	7.5%	5.4%
Stays Volume (millions)							
Total	1,383.9	1,346.2	1,301.8	1,267.2	2.8%	3.4%	2.7%
Day	706.1	679.8	659.9	651.8	3.9%	3.0%	1.2%
Overnight	677.8	666.5	641.9	615.4	1.7%	3.8%	4.3%
Overnight Business	210.5	211.8	204.9	206.3	-0.6%	3.4%	-0.7%
Overnight Leisure	467.3	454.7	437.0	409.1	2.8%	4.0%	6.8%
Person Stays Volume (millions)							
Total	3,022.8	2,903.0	2,796.7	2,684.5	4.1%	3.8%	4.2%
Day	1,559.3	1,474.1	1,428.3	1,385.9	5.8%	3.2%	3.1%
Overnight	1,463.5	1,428.9	1,368.4	1,298.5	2.4%	4.4%	5.4%
Overnight Business	327.4	325.5	310.2	309.9	0.6%	4.9%	0.1%
Overnight Leisure	1,136.1	1,103.4	1,058.2	988.6	3.0%	4.3%	7.0%
Person Days Volume (millions)							
Total	6,596.4	6,430.6	6,179.7	5,903.7	2.6%	4.1%	4.7%
Day	1,169.5	1,105.6	1,071.2	1,039.5	5.8%	3.2%	3.1%
Overnight	5,426.9	5,325.0	5,108.5	4,864.3	1.9%	4.2%	5.0%
Overnight Business	1,203.0	1,199.6	1,126.2	1,127.1	0.3%	6.5%	-0.1%
Overnight Leisure	4,223.8	4,125.3	3,982.3	3,737.1	2.4%	3.6%	6.6%
U.S. Travel Spending (millions)							
Total	\$700,188	\$679,003	\$624,847	\$587,485	3.1%	8.7%	6.4%
Day	\$124,119	\$119,639	\$105,611	\$102,104	3.7%	13.3%	3.4%
Overnight	\$576,069	\$559,364	\$519,236	\$485,381	3.0%	7.7%	7.0%
Overnight Business	\$167,058	\$165,476	\$157,290	\$157,768	1.0%	5.2%	-0.3%
Overnight Leisure	\$409,011	\$393,887	\$361,946	\$327,613	3.8%	8.8%	10.5%

Appendix F – 2005 Travel Industry Overview



Economic Indicators

Fuel/Gas Prices

Hurricane Katrina and the Devastating 2005 Hurricane Season

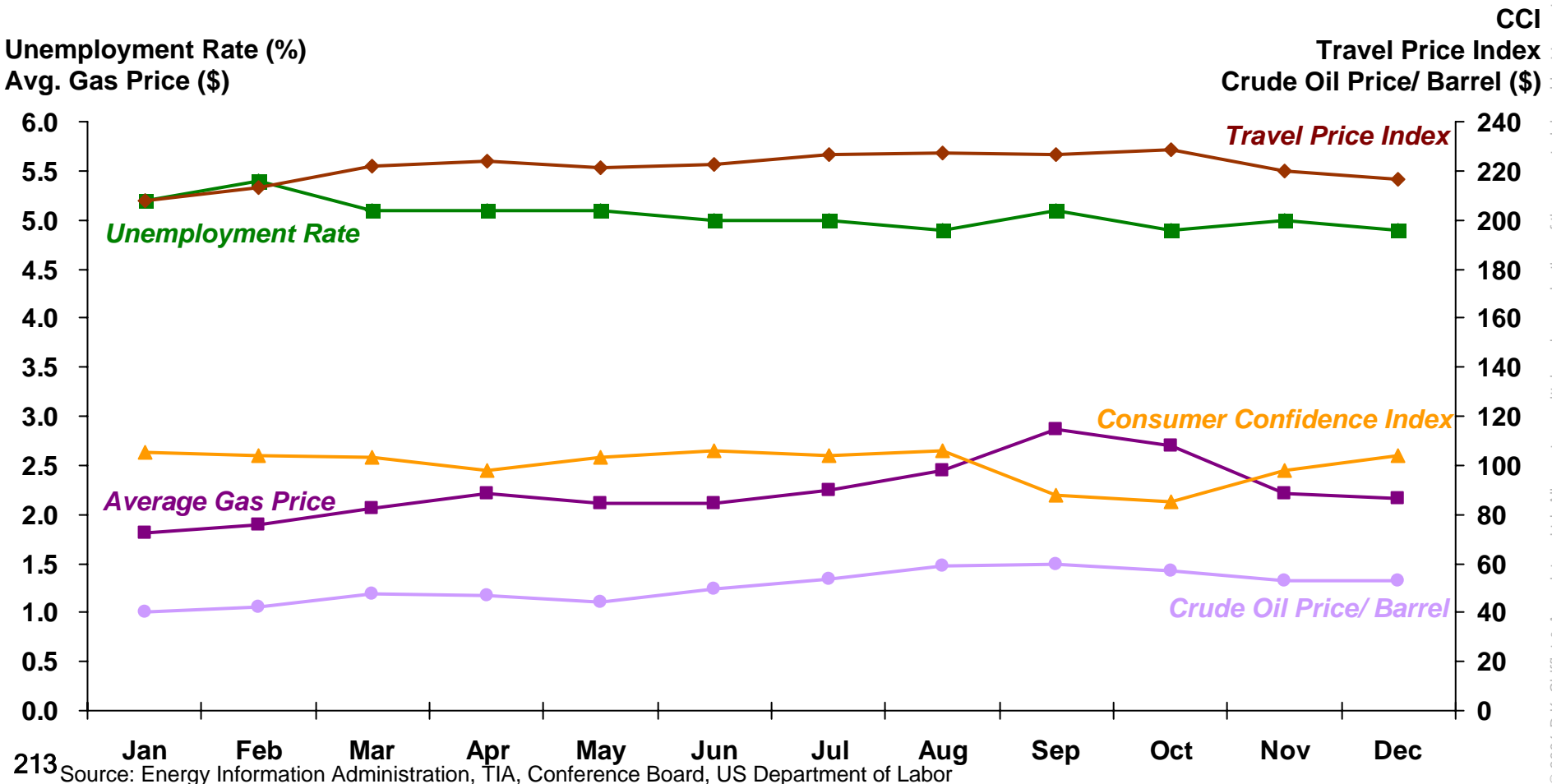
International Travel Volume



- In 2005, the U.S. economy (GDP) grew by 3.5% with most growth occurring in the first three quarters. A slowdown in the fourth quarter primarily reflected a deceleration in consumer spending amid fears about rising energy prices and diminishing employment prospects after Hurricane Katrina.
- Personal disposable income per capita was up in 2005, again a slight increase from 2004. The increase was still less than was enjoyed in the previous years.
- The growth in GDP and disposable income was also accompanied by an improvement in the unemployment rate that closed the year at 5.0% compared to the previous year of 5.9%.
- Consumer Confidence provided a mirror image to the unemployment rate. By the end of December 2005, Consumer Confidence stood at 103.6, up from 95.97 in December 2004.
- Likewise Consumer Confidence mirrored gas prices. By the end of December 2005, Consumer Confidence improved as gas prices decreased.
- Increases in crude oil prices had a direct effect on the Travel Price Index, and both the U.S. Origin and U.S. Foreign Air Travel Price Indices.



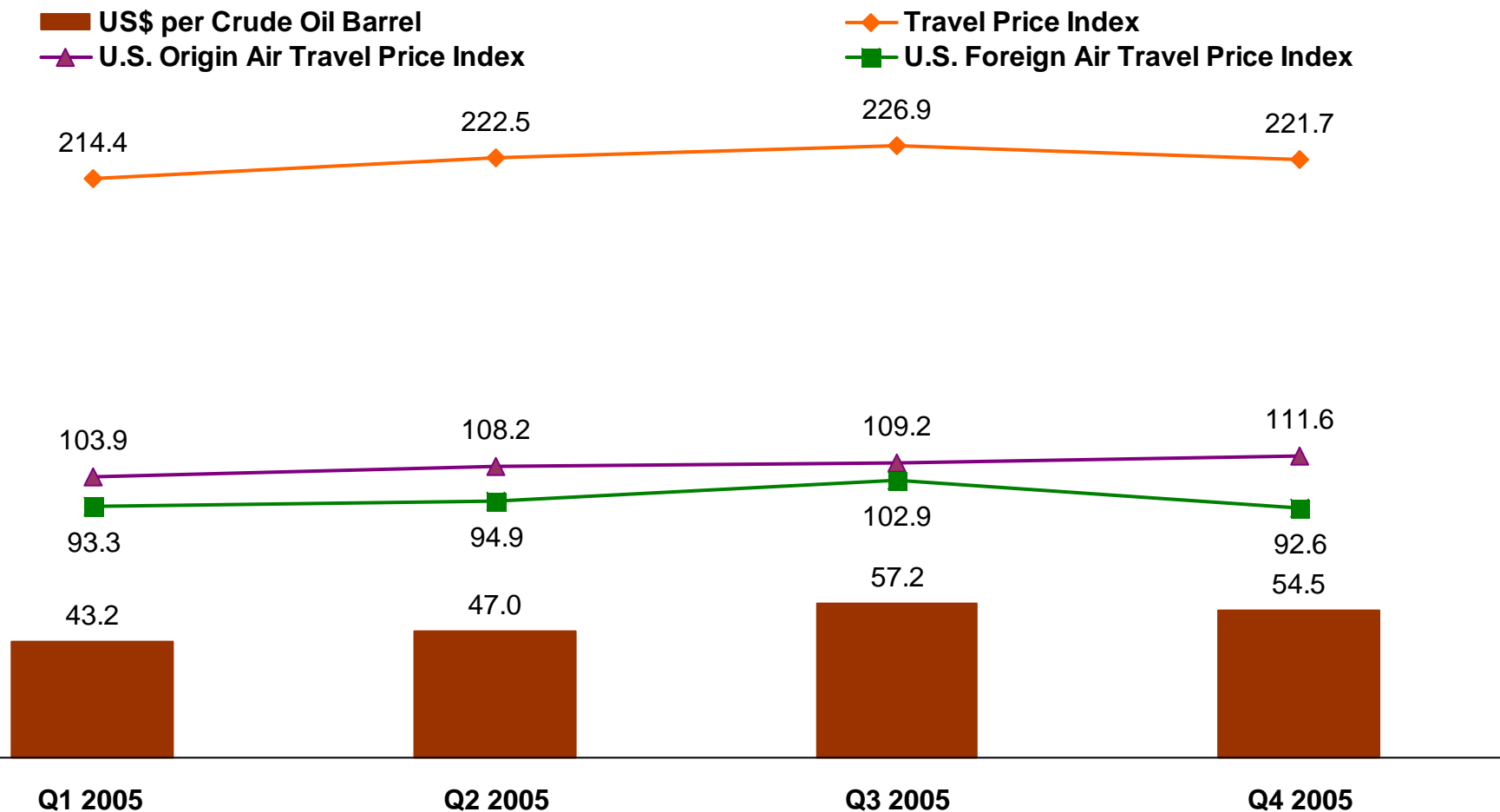
- The most interesting relationship in the graph below is that of the Consumer Confidence Index and the Average Gas Prices; as Gas Prices increased, Consumer Confidence decreased.



Travel Price Index by Cost for Crude Oil Barrel



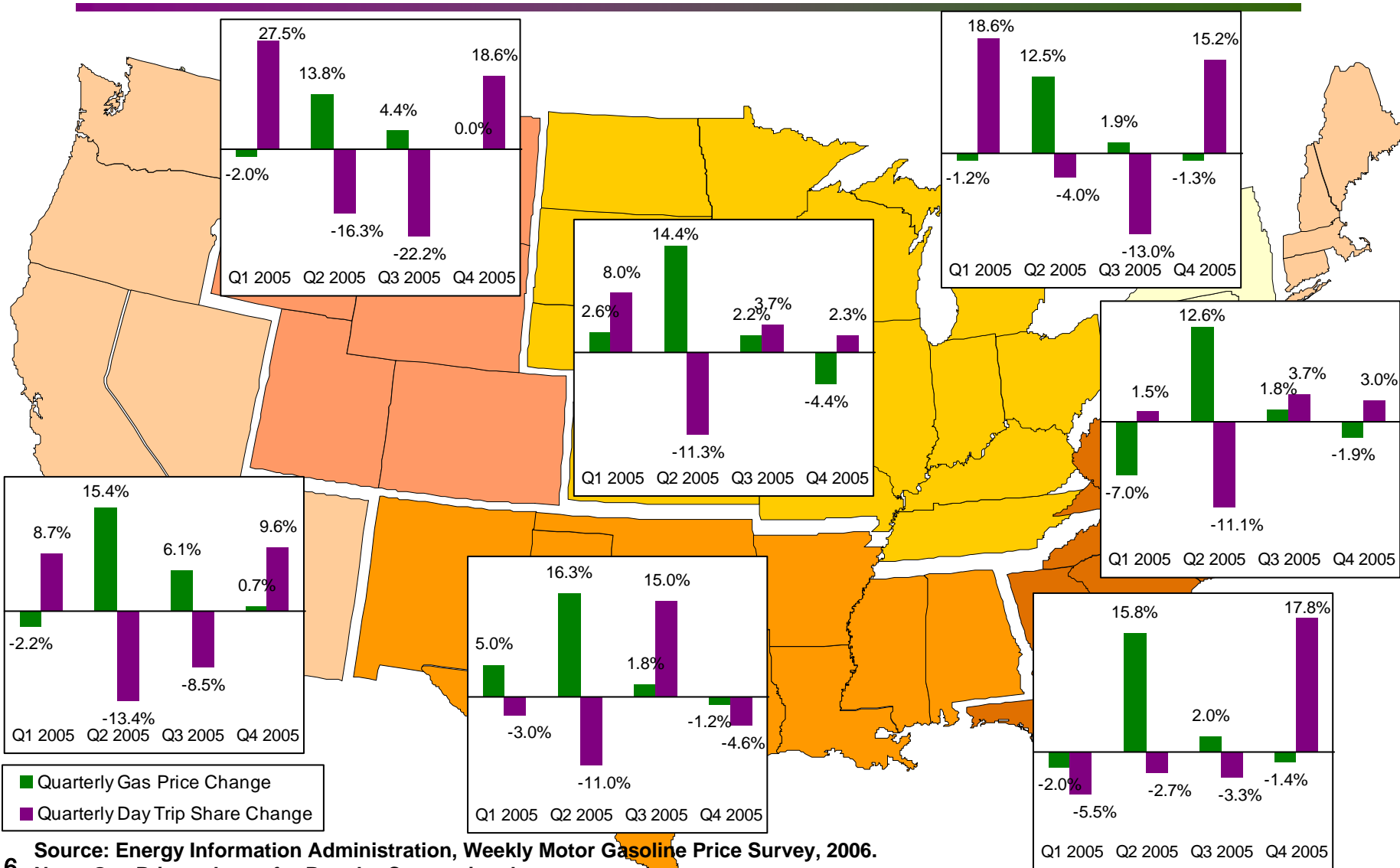
As the price of crude oil increased in Quarters 2 and 3, Travel Price Index, and both the U.S. Origin and U.S. Foreign Air Travel Price Indices increased.





- Average price per barrel of U.S. crude oil was \$50.26 in 2005 accounting for 70% of the rise in industry fuel bill
- Airline industry fuel costs are estimated to have risen to 23% of operating expenses, up from 17% (2004), 14% in 2003
- Gas prices jumped 41 cents a gallon in September over the previous month to a nationwide average \$2.86 for regular unleaded, the highest in years
- The average gas price per gallon in 2005 (\$2.24) was 43 cents more (up 24%) than a year ago but the travel price index for food, beverage and lodging were only up 3% in 2005 over 2004.
 - During the months of September and October, when gas prices were the highest, the Consumer Confidence Index was the lowest, at 88 and 85, respectively
- By a vote of 249-183, the House approved a comprehensive new energy bill designed to increase domestic energy supplies and lessen the nation's dependence on foreign oil (Q2)
- Transportation companies use the rise in gas prices to slap customers with fuel surcharges
 - Did not encourage summer vacationer to take fewer trips
- Travelers who finalized their plans were unlikely to cancel their trips
 - However, travelers who did not finalized their plans most likely decided to stay closer to home. There is the possibility that travelers postponed travel in the short term, while waiting to see if gas prices stabilize or drop
- Historically, AAA reports that the price of gas has never stopped people from traveling. TIA research shows that people tend to modify their trips to offset higher travel prices, including gas
 - However, concerns about availability have had an effect in the past

2005 Quarter over Quarter U.S. Average Gas Price vs. Leisure Day Trip Share Change (by Car)



Source: Energy Information Administration, Weekly Motor Gasoline Price Survey, 2006.
 Note: Gas Prices shown for Regular Conventional

Devastating 2005 Hurricane and Tropical Storm Season



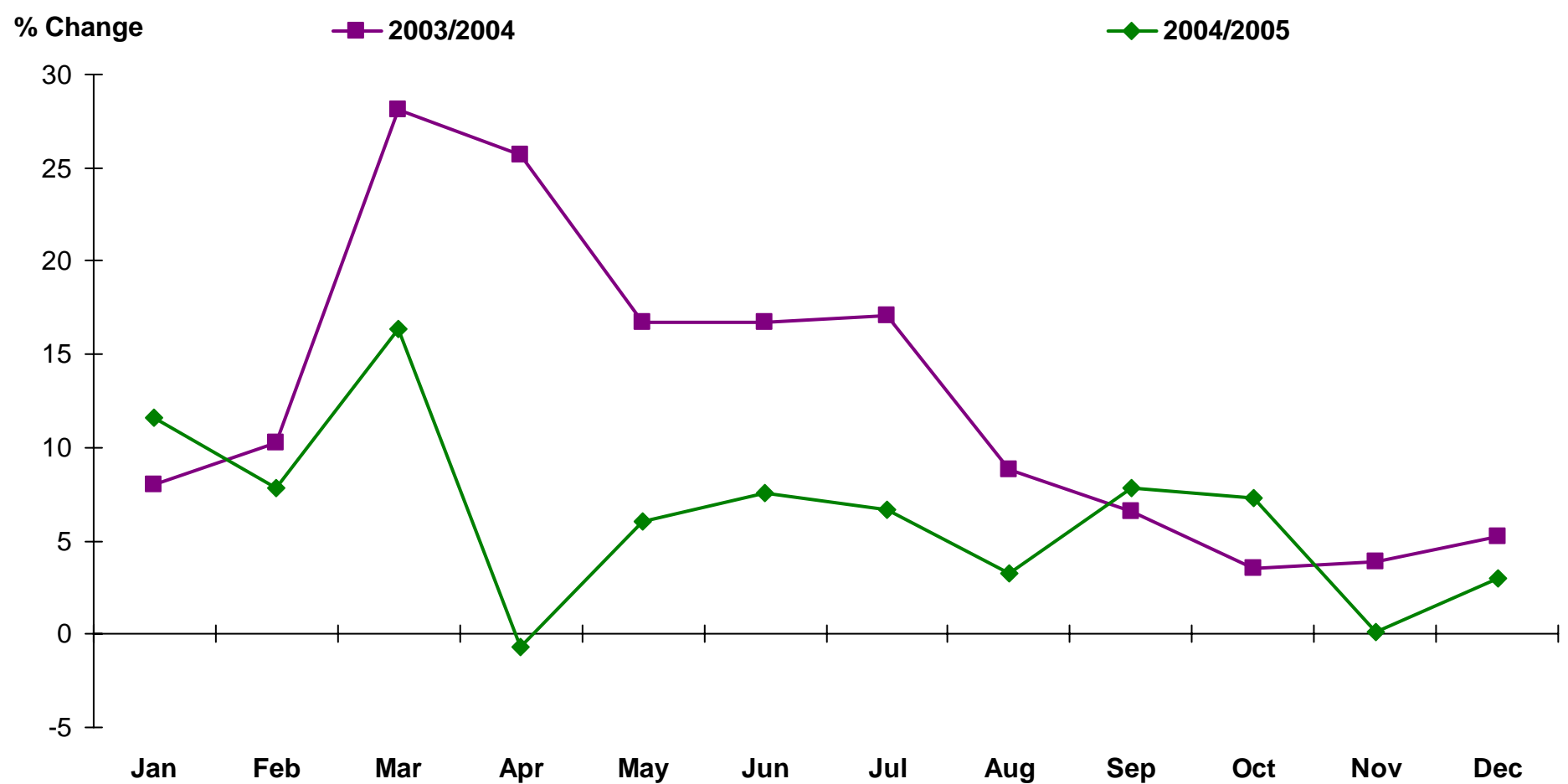
- Gas prices soared in Quarters 3 and 4, up 54% and 24%, respectively, over the same quarters in 2004
- The Gulf Coast region's tourism industry faced a major blow as it was forced to cancel or reschedule conventions and trade shows
 - Drained as much as \$50 millions in tourism revenue
 - Fourth quarter leisure travel dropped significantly in and from affected states
- New Orleans and other parts of Louisiana were especially hit with TIA estimations of \$37 million losses in tourism daily
- Hurricane Katrina shut down an estimated 1 million barrels of refining capacity in the region
- TIA's Travel Price Index rose from previous month due to spiraling gasoline prices
- Weak fall travel season due to a combination of soaring gas prices, Hurricane Katrina, a weak job outlook and shaky consumer confidence

Impact of Hurricane Katrina on Travel



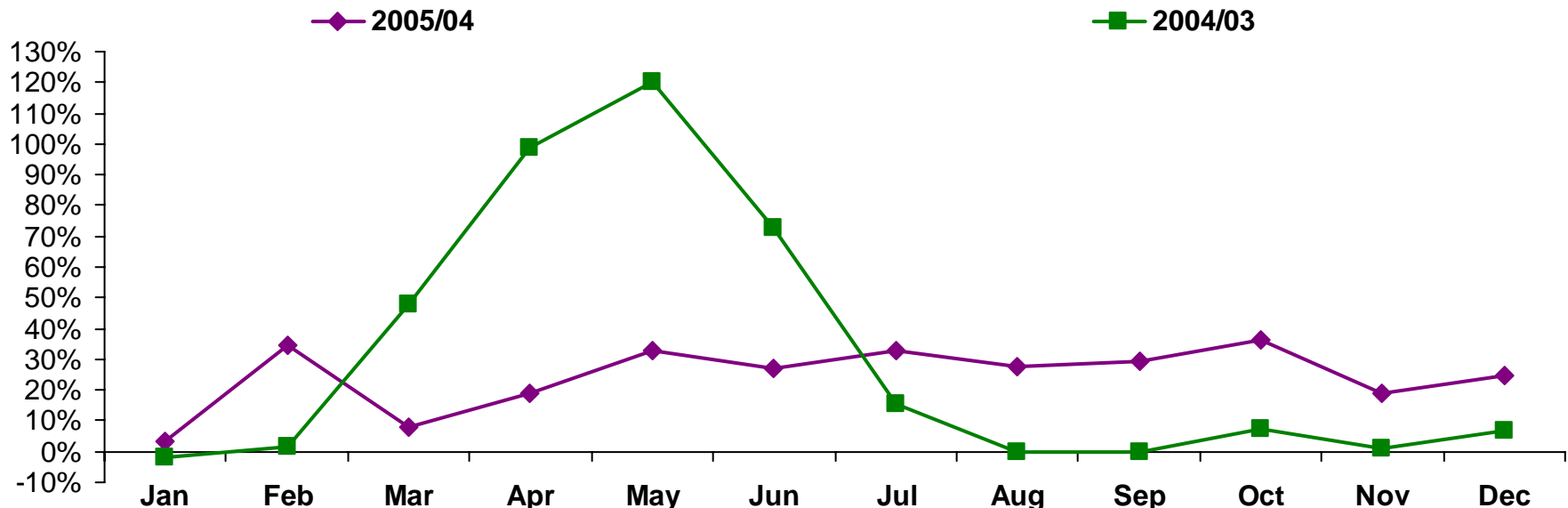
- Residents of the Gulf Coast states of Alabama, Louisiana and Mississippi were severely impacted by Hurricane Katrina.
- Estimates of the economic loss of the Travel and Tourism Industry in those states are \$18.3 billion in spending in travel-related businesses; 260,000 jobs (equates to 18% of total employment in all three states)
 - Louisiana: \$13.5 billion in travel spending; 191,000 jobs; Ongoing losses of \$37 million per day
 - Mississippi: \$2.8 billion in travel spending; 38,000 jobs; Ongoing losses of \$7.7 million per day
 - Alabama: \$2 billion in travel spending; 30,000 jobs; Ongoing losses of \$5.5 million per day
 - Travel or a decline in travel by residents of these states will impact many other states throughout the South and Nation.
 - Travelers from Alabama, Louisiana and Mississippi in September thru December of 2004 spent over \$7 billion in their home states and across the U.S.
 - On a share basis, Alabama felt the greatest impact with a loss of almost 300,000 person-stays and more than 13% of annual tourism revenue.

U.S. Inbound Travel From Western Europe (2003/2004 vs. 2004/2005/% Change)





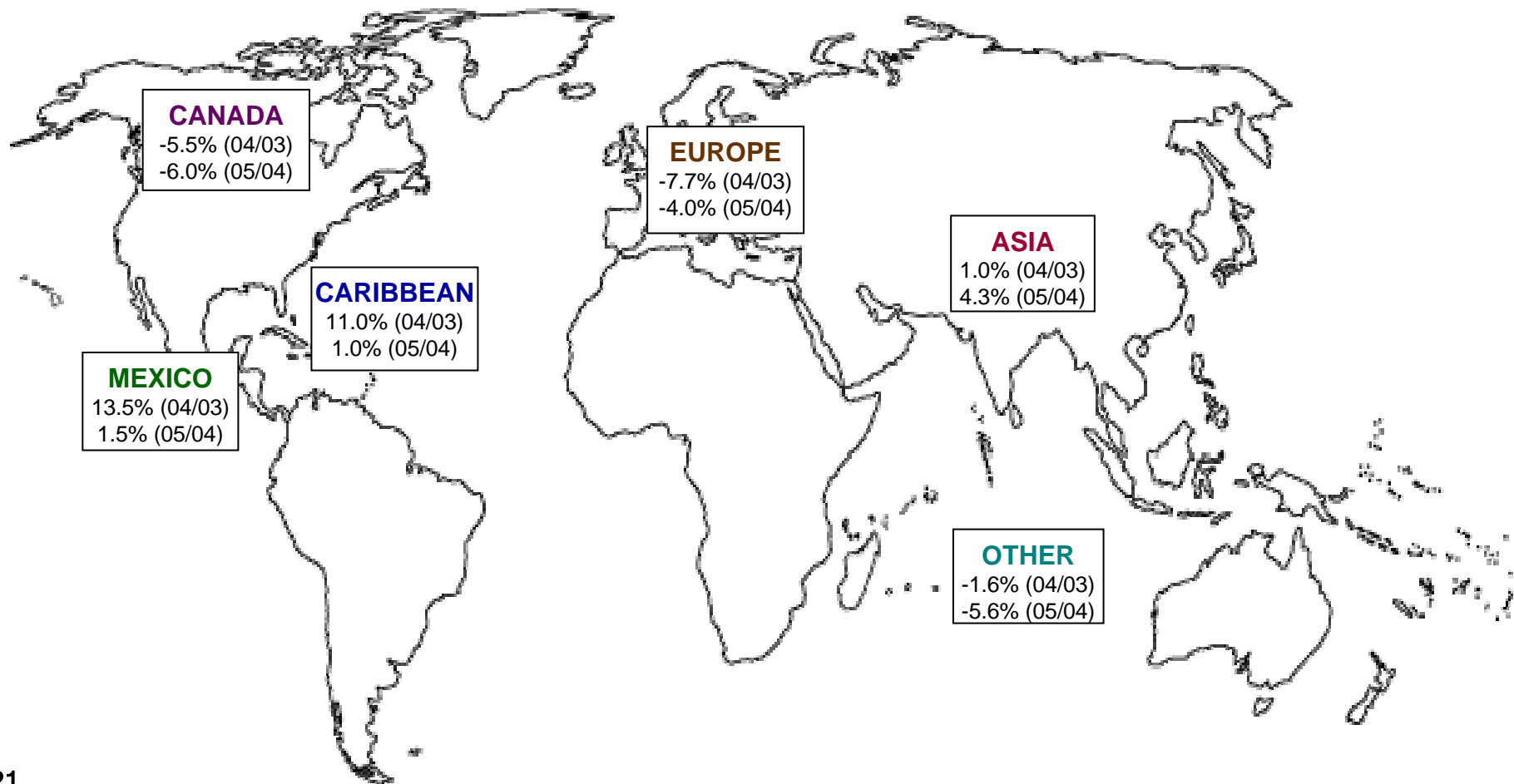
- International outbound travel data shows strength:
 - Growth predicted for tourism in the Middle East
 - Pacific Asia Travel Association's Strategic Intelligence Center estimated growth in Asian Pacific arrivals
 - Bird flu scare had no affect on business travel
- Weakness of US\$ against Euro and British Pound has given foreign visitors a chance to see the U.S. at bargain prices
 - But did not dampen foreign travel by Americans
- Passports were required in 2005 when traveling from Canada, Mexico, and Caribbean to U.S., as opposed to the identification cards used to travel between these countries in previous years
- Airlines will beef up service to China as the US and China relax their visa requirements.
 - The chart below shows the percent change in travel from China to the U.S. from 2004 to 2005



U.S. Resident Outbound Travel Volume Change (2003/2004 vs. 2004/2005/% of Paid Hotel/Motel Room Nights)



2005 U.S. Outbound travel remains down in Northern regions: Canada and Europe, and up in Southern regions: Caribbean, Mexico and Asia



2005 Recap of Other Travel Industry Events



National Trends:

- Hawaii, Las Vegas, and New York City are the hottest U.S. destinations while Rome, Caribbean Islands, and London make most desirable international tourist spots
- San Diego most desirable place to hold meeting, followed by San Francisco and Orlando

Quarter 1, 2006

- Devastating tsunami hit the Indian Ocean on December 26, 2004 . Economists anticipate that one of the world's worst human disasters may have a relatively marginal economic impact
- Airlines beef up service to China as the U.S. and China relaxed their visa requirements
- Transportation Security Administration certified more precise screening machines in airports

Quarter 2, 2006

- The State Department rolled out a new national security plan that will require U.S. citizens to carry passports when traveling home from Canada, Mexico and the Caribbean

Quarter 3, 2006

- Synchronized bomb attacks on London's transit system on July 7th , 2006 and three smaller explosions went off on London's buses two weeks later
- Hurricane Katrina hit in August
- Gas prices peaked in September

Quarter 4, 2006

- Consumer Confidence peaked in October
- Major earthquake devastates South Asia
- Bird Flu scare
- Average daily room rates increased according to Smith Travel Research